Electronic Research Administration
A program of the National Institutes of Health

NIH National Institutes of Health
Office of Extramural Research

# Account Management System (AMS) User Guide for iEdison external

**Oct 26, 2017**

## CONTACT US

Document Comments:

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**How are we doing?** The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: eRACommunications@mail.nih.gov.

**Troubleshooting support:**

Please contact the eRA Help Desk:

**Toll-free:** 1-866-504-9552

**Phone:** 301-402-7469

**TTY:** 301-451-5939

**Web:**http://grants.nih.gov/support (Preferred method of contact for **external** users)

**Web:**https://inside.era.nih.gov/eRA_helpdesk.cfm (Preferred method of contact for **internal** users)

**Email:**commons@od.nih.gov (for Commons Support)

**Email:**helpdesk@od.nih.gov (for IMPAC II Support)

**Hours:** Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

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## 1.1 Latest Updates

Updates and new features in AMS:

### Oct 26, 2017

- The account unlock operation now requires the user to login that day: When an administrator unlocks an account that's been locked due to inactivity, an email notification is sent that asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

### May 18, 2017

- The temporary passwords used in system-generated iEdison external account invitations and password reset emails are only valid for 24 hours: Users must log in the same day they receive the notification email, and those who attempt to login with an expired password will be redirected to the password reset/lost password workflow.For more information see Account Invitations from eRA Systems, Initial Login to eRA Account, and Reset Password.

### Feb 16, 2017

- The AMS User Guide has been split into separate documents for each user domain ( Agency, Commons, iEdison, State Dept). When you login to AMS, the system recognizes your domain and uses it to select the correct online help package.
- It's now possible to search for system accounts by IMPACII user ID.
- Added a more prominent link to the Person Administration module in the Manage Account and Create Account confirmation screens. Click to manage user names and other personal information.

### Dec 22, 2016

- When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked. See Reactivate Account
- eRA Service Desk agents can click the **Add Roles to Other org** button to give a system account roles in another organization. See Add/Delete System Roles

- Added instructions for verifying a new Commons account when you receive a *Notification of New Account* from eRA. See Notification of New Account

## Nov 17, 2016

- Removes all roles associated with an account when Account Coordinators or Service Desk Agents deactivate the account.
- Allows Account Coordinators to re-certify active accounts to prevent the account holder from getting locked out. Note it will be a requirement for Account Coordinators to input a comment and upload an account request form to clarify the re-certification.
- Allows eRA Service Desk Agents to reactivate users and add mapping if no mapping exists.
- Enhances Deactivated Users Report to display correct information, including Deactivated By and Account Deactivation Date.
- Updates the email notifications sent prior to account deactivation to indicate that users should contact their Account Coordinator instead of the eRA Service Desk to request account re-activation.

## Sept 15 2016:

- The Create Account screen now lets NIH/Agency administrators search the NED system to find user profiles in their organizations. See Create Agency Accounts for more information.

- Create-Account requests for untrusted Commons accounts can now be approved or rejected automatically. See Create Commons or external iEdison User Accounts for more information.

## Aug 18 2016:

- Enhancements to the reporting functionality, including a new internal report on deactivated user accounts. See User Reports.

- Account Coordinators can now upload new or revised account request forms from the Manage Account screen. See Manage Account Request Forms for instructions.
- Account Coordinators and Service Desk agents can now search for accounts that have been locked due to inactivity and reactivate them. See Search by Status for instructions.

- New requirements for accounts with administrative roles: Once a user has held an administrative role (SO/AO, AA, BO, or TTO Admin/User) at one institution, that account cannot be changed to a strictly scientific role, and cannot be affiliated to a different institution in any administrative **or** scientific role: In these cases, the former administrative user must create a new account to use in his or her new role. See Affiliate Account for more information.

## July 22 2016:

- Service Desk Agents can now update User IDs on their accounts.
- In the Search Results screen, the label of the Filter box has been changed to Filter Results.
- Search-by-country functionality is now available for state accounts.

## June 23 2016:

- AMS validates users' affiliations for administrative roles (SO/AO, AA or BO user roles) to make sure users have administrative roles at only one institution.
- The Account Coordinator (or the Service Desk) can now view and if necessary replace an account's Account Request Form (ARF).

# 2 Overview

The Account Management System (AMS) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

## 2.1 iEdison external Staff

External iEdison management staff have the ability to search, create, maintain, and view user and system accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view user accounts only for their organization. The external iEdison management staff have the ability to search, create, maintain, and view **user** and **system** accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view user accounts only for their organization.

## 2.2 User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

### 2.2.1 iEdison External Management Staff

- Extramural Technology Transfer Office Administrator (Extramural TTO Admin)

## 2.3 Account Statuses

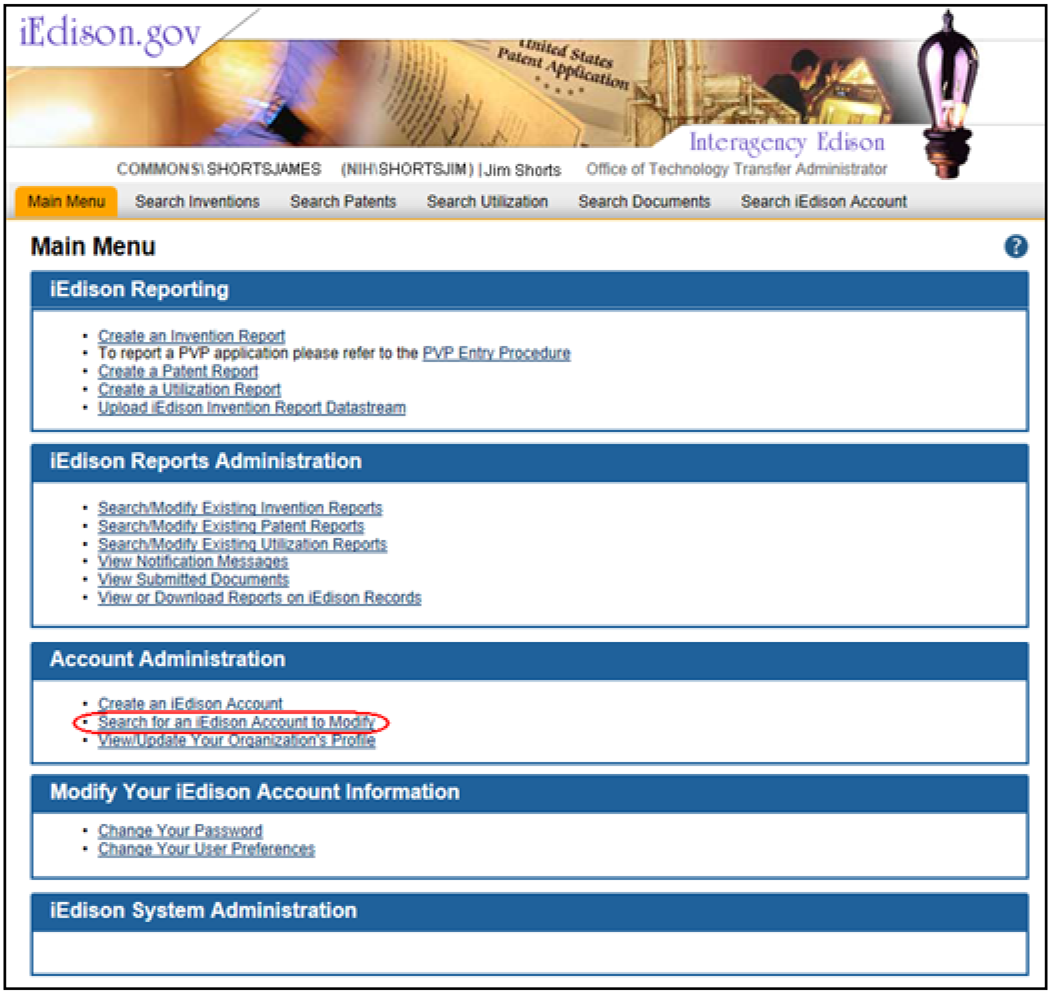
AMS user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

# 3 Accessing AMS

## 3.1 External iEdison Users

To access AMS, go to the iEdison *Main Menu* and click **Search for an iEdison Account to Modify**, as shown here.

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**NOTE:** Before you attempt to create a new account, it is best to perform a search to make sure the user doesn't already have an account. But you can also launch AMS by clicking the **Create an iEdison Account** hyperlink.

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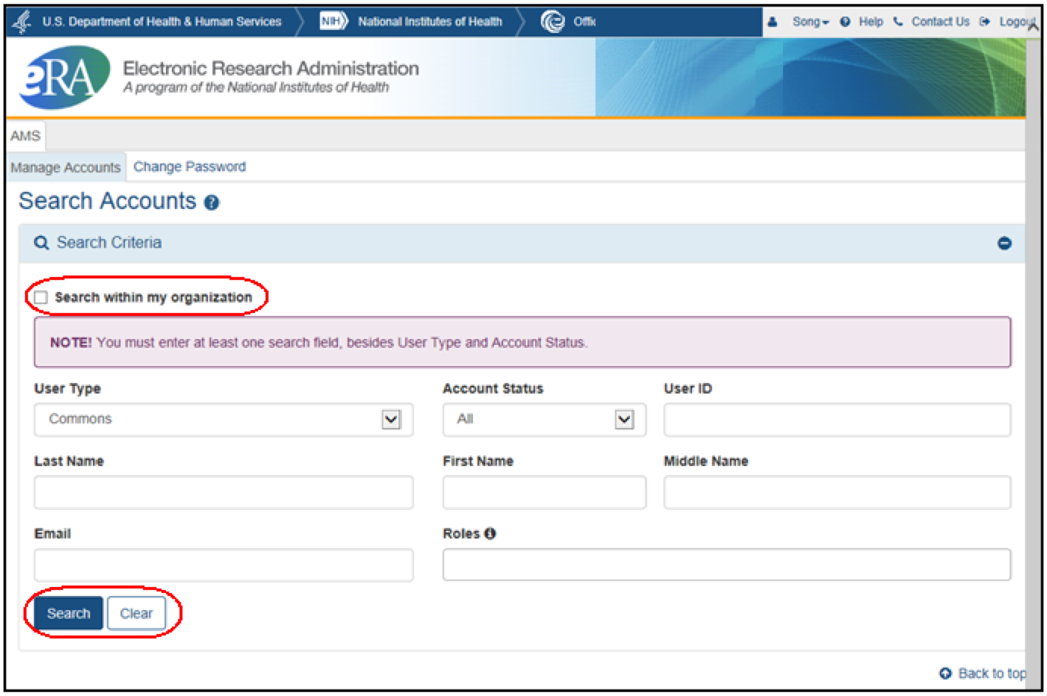
When you click **Search for an iEdison Account to Modify**, the AMS *Search Accounts* screen opens, as shown here.




For instructions on performing a search, see Search Account.

## *3.2 Logging Out of Account Management System (AMS)*

To log out of AMS, click the **Logout** button at the top right corner of the any screen.

# 4 Search Accounts

## 4.1 User Accounts

Use the *Search Accounts* screen to search for existing user and system account(s) within or outside of your organization or institution.

See Search for User Accounts

## 4.2 System Accounts

Agency, Commons and external iEdison users can search for system accounts

See Search for System Accounts

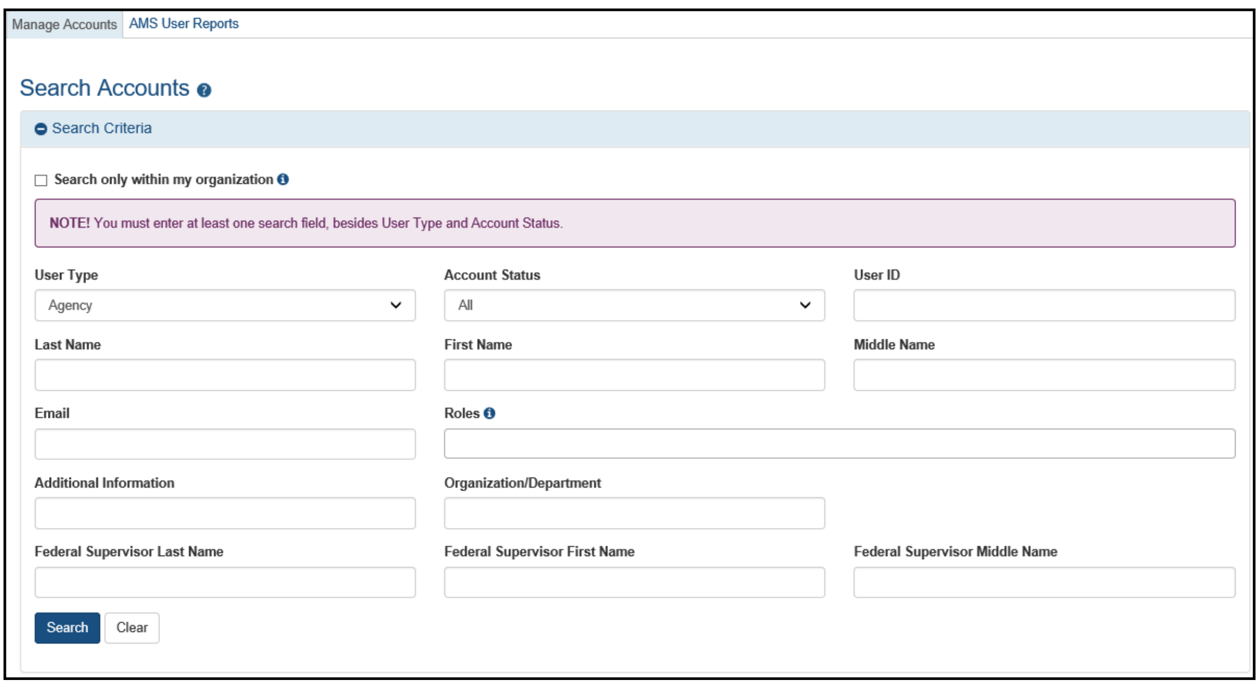
### 4.2.1 Certificates

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:Section 2.4.2 for iEdison users

## 4.3 Search for iEdison User Accounts

The *Search Accounts* screen for iEdison users (external, Agency, and iEdison Report Lite (ERL) provides the ability to search for existing user and system account(s).

**NOTE:** For all iEdison users the **Search within my organization** check box is automatically checked.



**NOTE:** For external iEdison users the **User Type** is *Commons*.

**NOTE:** For Agency/ERL users the **User Type** is *Agency*.

**NOTE:** You must enter at least one search field, besides the **User Type** and **Account Status**. The percent sign (%) can be used as a wild card character to search for a string of characters.

1. Enter search criteria in at least one of the other search fields.
2. If you wish, select the appropriate Role.
    a. To select multiple roles, hold the **<Ctrl>** key and highlight the appropriate roles.

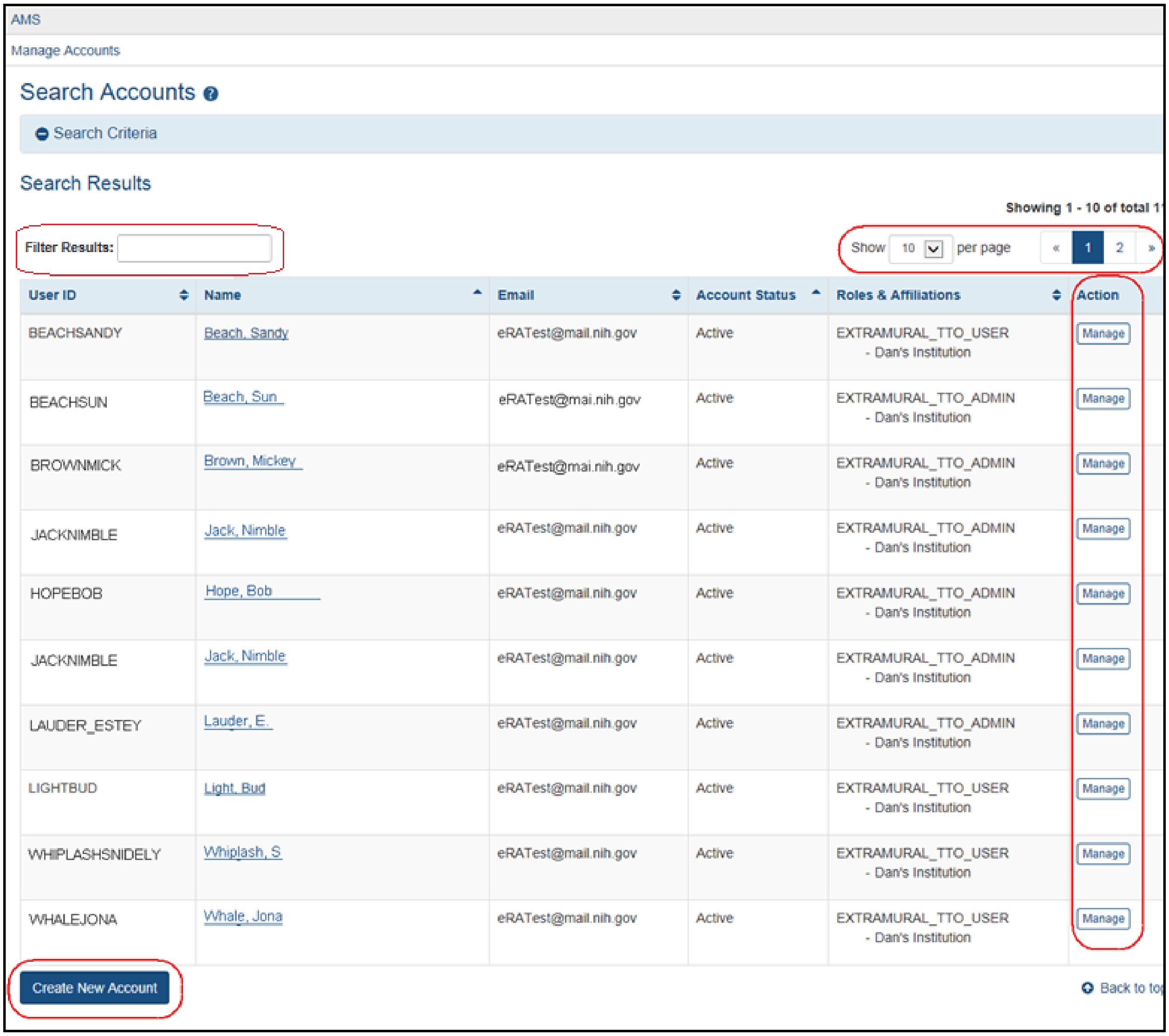
**NOTE:** When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

3. Perform one of the following options:
    a. Click the **Search** button to execute the search.
        i. Please refer to the Search Results for iEdison User Accounts topic or Agency and iEdison Agency/ERL User Account Search Results
    b. Click the **Clear** button to clear the search criteria.

If an external iEdison user has appropriate privileges to work with system accounts and the **User Type** selected is *System* , then the **Search within my organization** check box is automatically checked. For more information, see Search for System Accounts.

### 4.3.1 External iEdison User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* .




**NOTE:** The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending* - The **Resend Email** button displays in the **Action** column.

  - *Pending Affiliation* - The **Manage** button displays in the **Action** column.
  - *Profile Only* - The **Create** button displays in the **Action** column.
- **Roles & Affiliations**
- **Action** - The **Action** button is **Manage**.

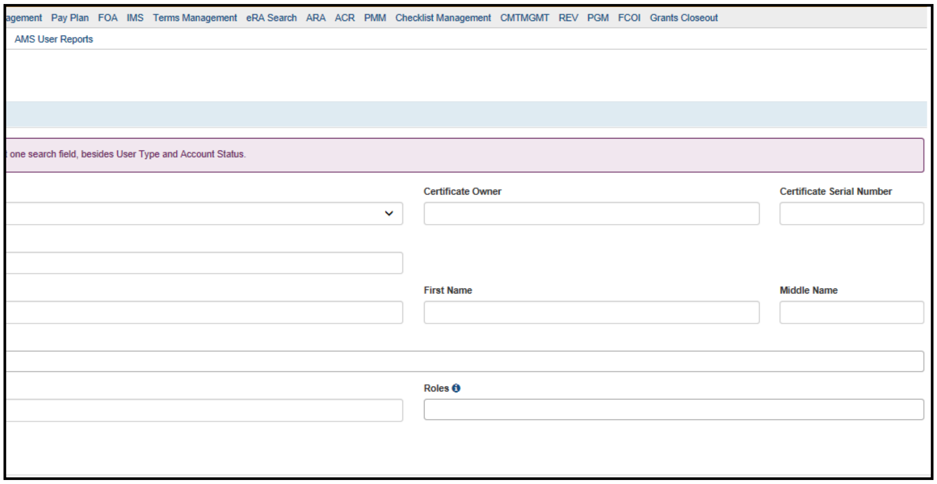
You can take these actions to view and navigate the search results:

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
   a. For example, to view all users with the Extramural TTO User role, type *TTO user* in the **Filter:** text box.
3. To change the number of records per page, select a number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
   a. Click the appropriate **Page Number** button.
   b. Click the **right double arrows** button to go to the end of the list.
   c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. To view the *NIH Support View* screen, select the appropriate name hyperlink in the **Name** column.
   a. For more information, please see the NIH Support View topic.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a users' multiple affiliations.
8. To perform one of the options in the **Action** column, See Actions Options.
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen. See Create external User Accounts.
10. To return to the top of the screen, click the **Back to top** hyperlink.

## 4.4 Search for System Accounts

Use the , to search for existing user and system account(s).

**NOTE:** Agency, Commons, and external iEdison users can search for and create system accounts.




**NOTE:** You must enter at least one search field, besides the **User Type** and **Account Status**. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

Perform the following steps:

1. To search for a system account, select *System* from the **User Type** field's drop-down menu.
2. Enter the appropriate search criteria in at least one of the other search fields besides **User Type**.
3. Use the **User ID** field to search by IMPACII user ID
4. If you wish, select a **Role** from the drop-down menu. (To select multiple roles, hold the **<Crtl>** key and highlight the desired roles.)

**NOTE:** When you search by system roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

5. Click **Search** to execute the search or click **Clear** to clear the fields and start over.

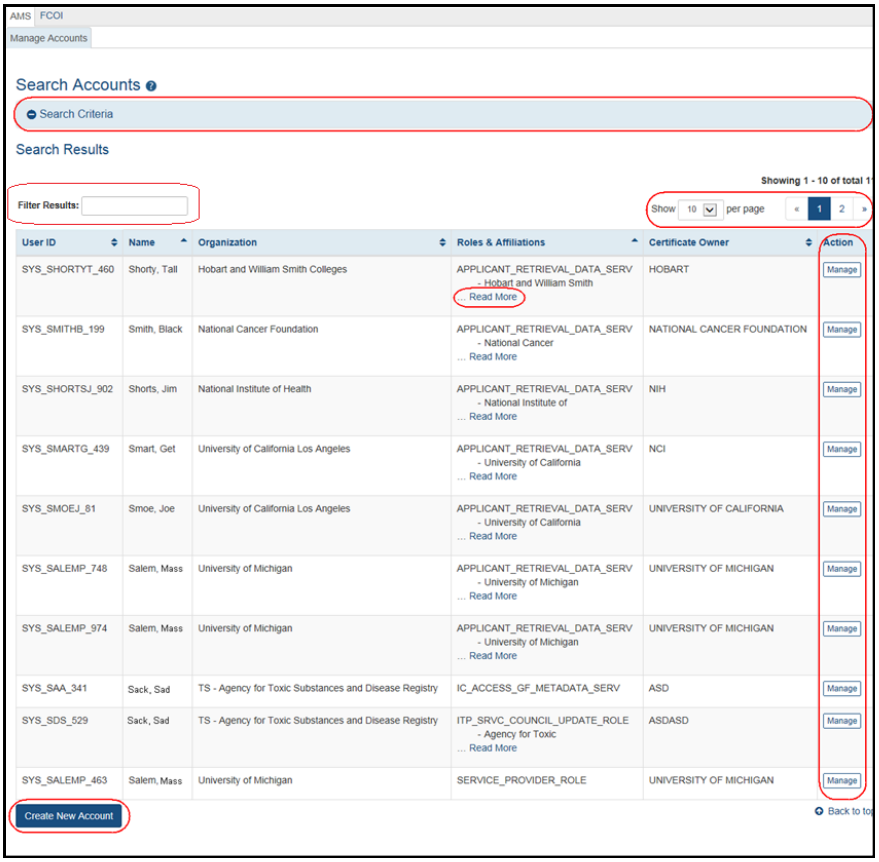
### 4.4.1 System Account Search Results

When the **Search** button is clicked, the system displays appropriate system accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

**NOTE:** The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Organization**
- **Roles & Affiliations**
- **Certification Owner** - The **Certificate Owner** is the organization who acquired the certificate.
- **Action** - Option button is **Manage**.




Perform one or more of the following steps :

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
    a. For example, to view all users with the last name of Salem, type *Salem* in the **Filter:** text box.

**NOTE:** The default number of records per page is 10.

5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the list.
    c. Click the **left double arrows** button to go to the beginning of the list.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a system user's multiple affiliations.
8. To manage a system account, click the **Manage** button in the **Action** column.
    a. Please refer to the Manage System Accounts topic for more information.
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
    a. Please refer to the Create System Account topic for more information.
10. To return to the top of the screen, click the **Back to top** hyperlink.

# 5 Create Accounts

You can create the following types of accounts:

### 5.1 [Create User Accounts]

### 5.2 [Create System Accounts]

### 5.3 Create an iEdison external user account

1. To create a new user account, first search AMS to make sure the user doesn't already have an account. For instructions, see Search for iEdison User Accounts.
2. You launch the create-account process from the Search Results screen Search Results screen.
   - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column: 


     Click the **Create** button to create a user account for that profile.
   - Or click the **Create New Account** button located below the search results: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**NOTE:** For external iEdison users, click the **Create an iEdison Account** hyperlink on the iEdison *Main Menu* screen to create an account.

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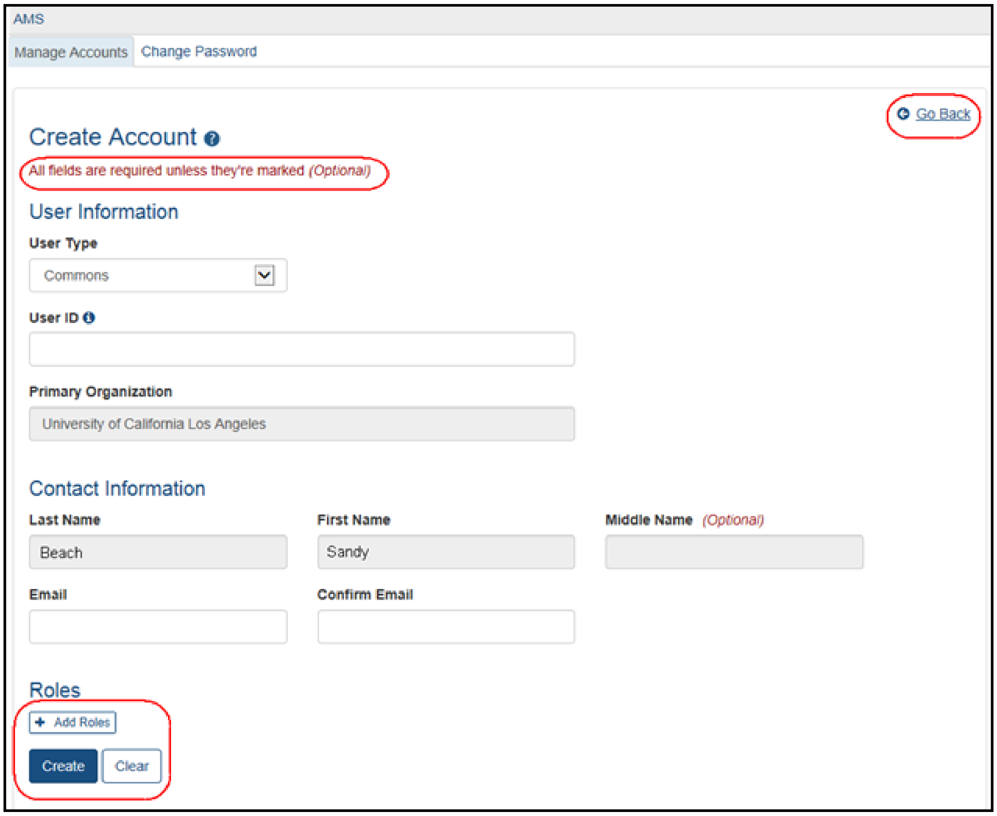
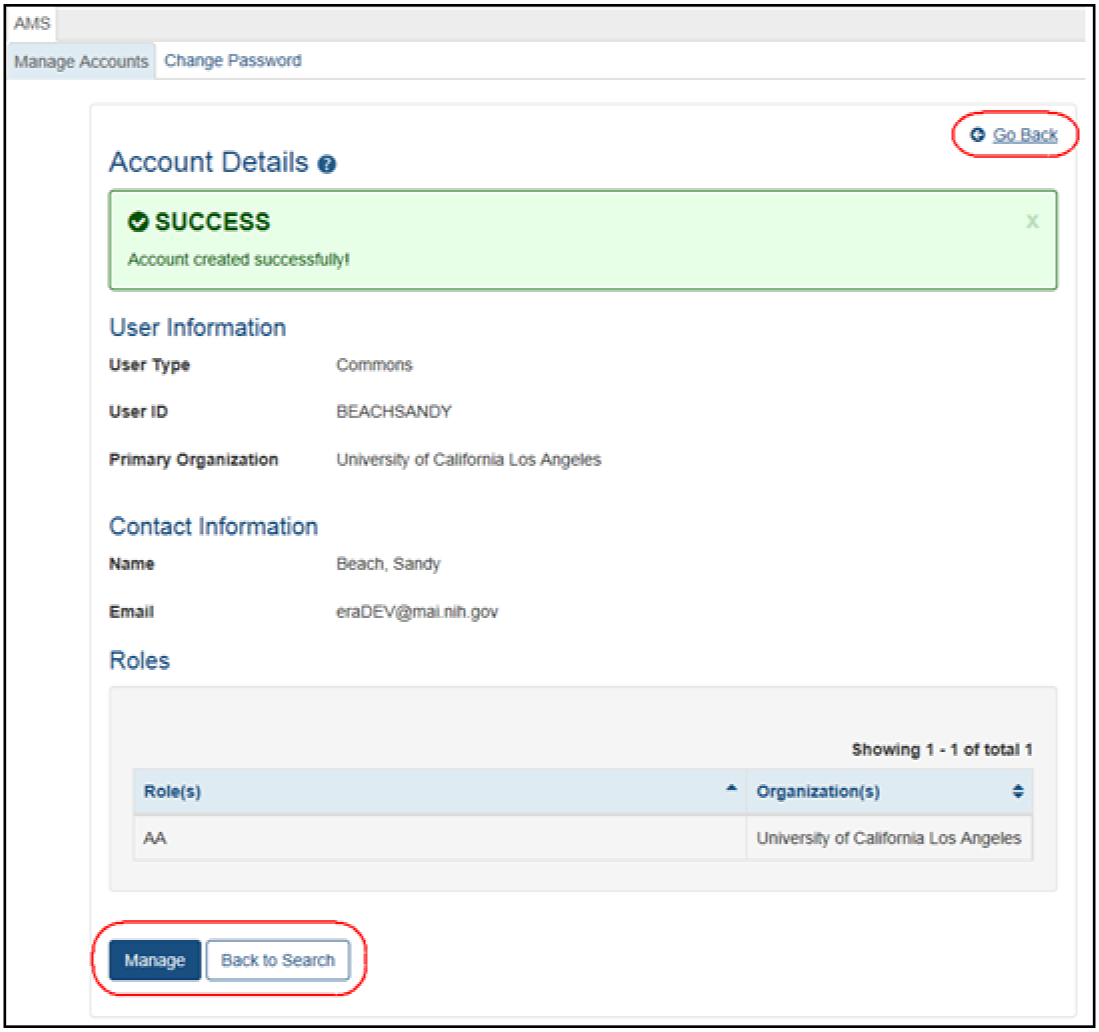
3. When you click one of the **Create** buttons, the *Create Account* screen opens, as shown below.




Perform the following steps to create an account:

4. Set **User Type** to Commons.
5. Enter the **User ID** or let the system generate one.
    a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
    b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one*.
6. Usually the **Primary Organization** defaults to the logged in user's organization.
    a. If there is no user organization name selected, click the magnifying glass icon to assign a **Primary Organization**. (See Set Primary Organization for more information.)
7. Perform one of the following options:
    a. When the account information is complete, click **Create** to create the account or click **Clear** to clear all information from the form.

When you click **Create**, the system displays the *Account Details* screen with a success message, as shown here.




6. Perform one of the following options on the *Account Details* screen:
    a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
    b. To edit the account's information, click the **Manage** button.
        i. For more information, please refer to the Manage Account for Commons Users topic.
    c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

### 5.3.1 Account Invitations from eRA Systems

Create-Account requests for eRA accounts that are validated by invitations from eRA modules can be approved or rejected automatically:

- If the identifying information the new user submits unambiguously matches the profile created by the account requester and the profile is not already associated to another user account, the request is approved automatically.
- If the identifying information is incorrect or an account already exists for the user profile, or if a comment has been entered in the user's funding and committee service history, request is denied and the system sends notifications to the account requester and to the eRA Service Desk.

#### *5.3.1.1 Examples of system-generated account invitations:*

- **SO creates a new PI account in AMS**

  The new PI receives a system-generated invitation to log in to eRA Commons and validate the account.

- **SRO enables a new reviewer in Internet Assisted Review (IAR)**

  The reviewer receives a system-generated invitation to log in to eRA Commons and create an account to access IAR. See the IAR Online Help for information on enabling reviewers

- **PD/PI appoints a new trainee in xTrain**

  The trainee receives a system-generated invitation to log in to eRA Commons and create an account to access xTrain. See xTrain Online Help for information on appointing trainees.

#### *5.3.1.2 Workflow*

The account invitation procedure includes these steps:

1. The account requester creates the new account.
2. The new user receives an email notification that includes the username and other details about the new account.
3. The user receives a second email that includes a temporary password for the new account and instructions for logging into the system. This email explains that that the user must login to the system that day or the account will be locked. After an account is locked, any attempt to log in will be redirected to the password reset/lost password workflow.. See Initial Login to eRA Account.

4. The user logs in with the provided credentials and is immediately instructed to create a new password for the account.

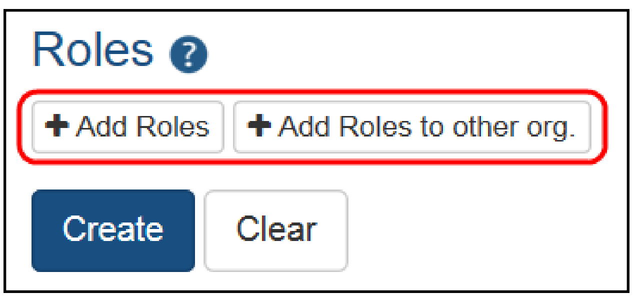
**NOTE:** If the user enters incorrect login information too many times, the account is locked and the user must contact the eRA Service Desk to complete the login process.

### 5.3.2 Add/Delete User Roles

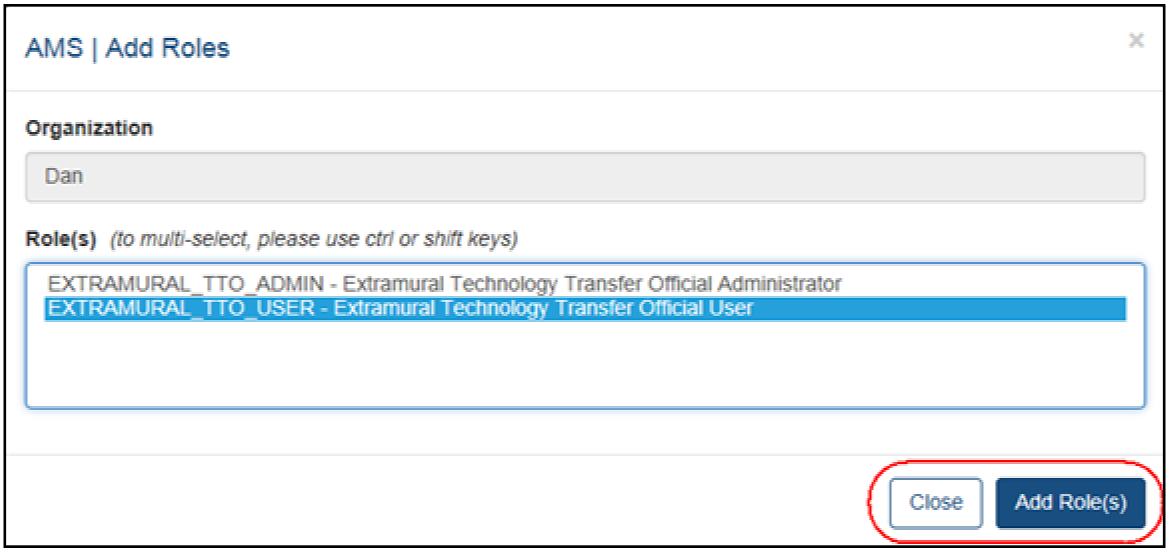
**NOTES:**

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.

1. To add user roles to an account, click on the + **Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.

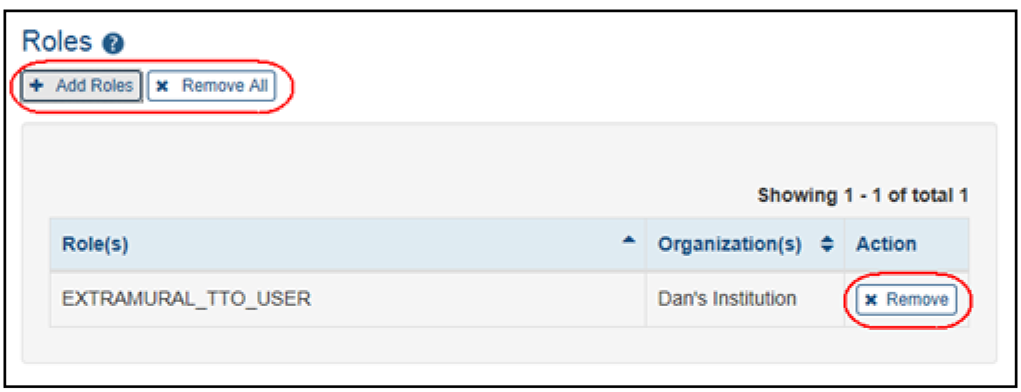



When the + **Add Roles** button is clicked on the *Create Account* or *Modify Account* screen, the pop-up *Add Roles* screen displays.




1. Select the appropriate role.
2. Click the **Add Roles(s)** button.

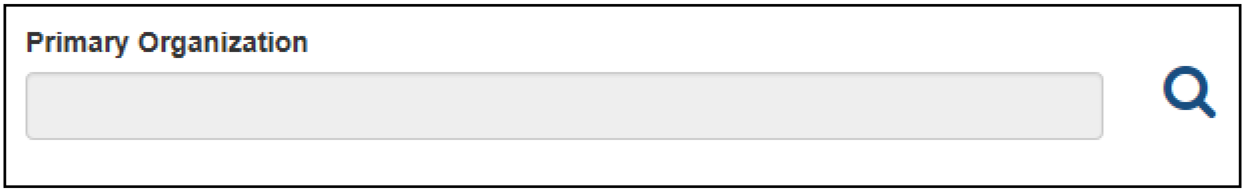
When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).




3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

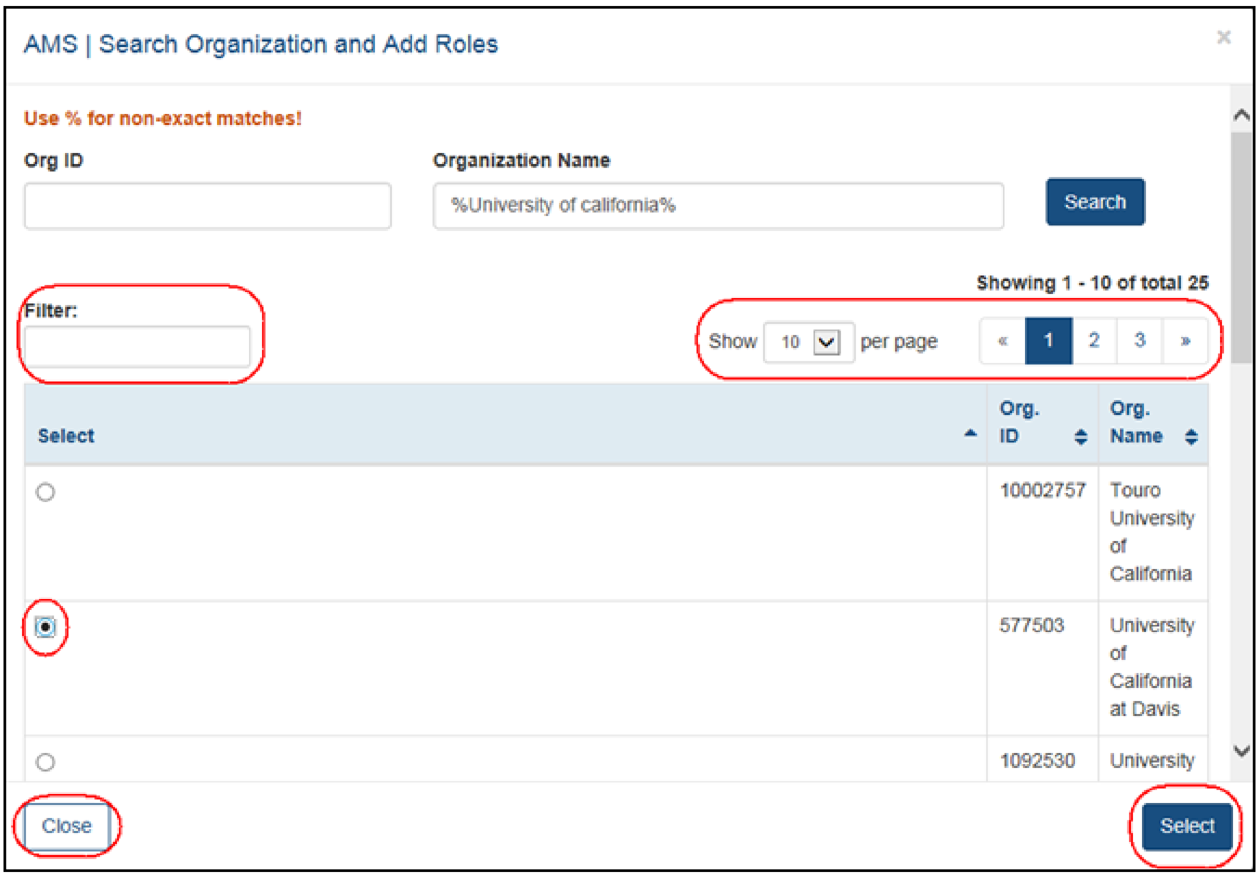
### 5.3.3 Set Primary Organization

**NOTE:** The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged in user's Organization.




1. To add a primary organization click the **magnifying glass** icon on the *Create Account* screen.

When the **magnifying glass** icon is clicked, the *Search Organization and Add Roles* screen opens.




2. Enter an **Org ID** or an **Organization Name**.

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**NOTE:** Wild card characters such as the percent sign (%) can be used to search for a string of characters.

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3. Click the first **Search** button.

When the first **Search** button is clicked, the organization is displayed, if present.

4. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
    a. Click the appropriate **Page Number** button.
    b. Click the **right double arrows** button to go to the end of the list.
    c. Click the **left double arrows** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. For more information see Create External User Accounts.

## *5.4 Create System Accounts*

System accounts are used to access eRA Web Services.

Agency, Commons, and external iEdison users can create system accounts.

1. To create a system account, first perform a search to make sure the account you want to create does not already exist.
    a. For instructions see Search System Accounts.

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**NOTE:** The **Create New Account** button described below is not available until a search is performed.

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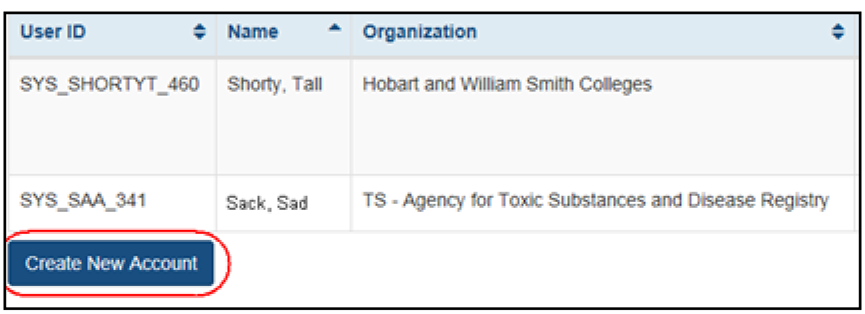
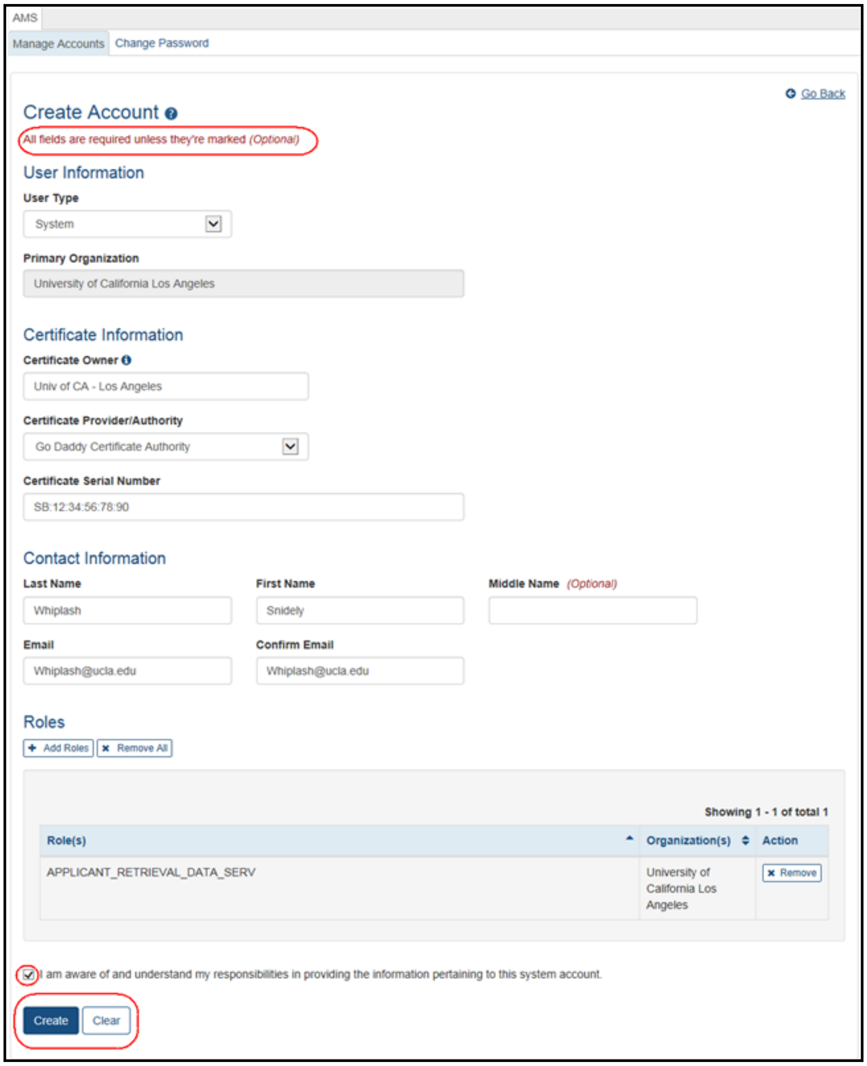
2. Review the search results to see if the account you want already exists, and if not, click the **Create New Account** button that appears below the search results, shown here:




When you click **Create New Account**, the .

3. Select *System* in the **User Type** drop-down menu.

When you select user type *System*, the screen displays the fields you need to complete for a system account.




4. Type in the owner in the **Certificate Owner** field. The **Certificate Owner** is the organization who acquired the certificate.
5. Select the appropriate **Certificate Provider/Authority** from the drop-down menu.

**NOTE:** Examples of the values that are available for the Certificate Provider/Authority include: Comodo, Digicert, Entrust, Geo Trust, Go Daddy, InCommon, and Thawte.

6. Enter the **Certificate Serial Number** in the format XX:XX:XX:XX:XX:XX:XX:XX.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, refer to one of the Web Services Certificate (S2S) Guide:

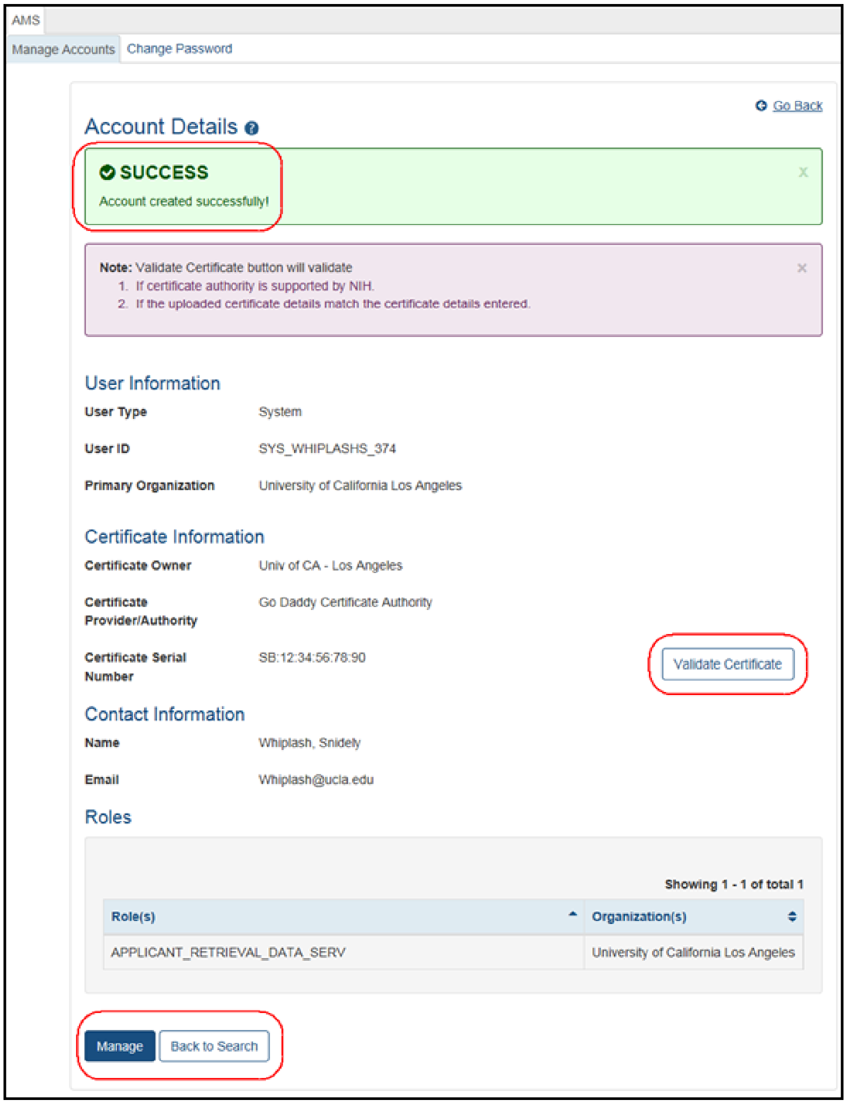
- Section 2.4.2 for iEdison users - only users with the TTO Admin user role have the privileges necessary to register the certificate in AMS; iEdison users must work with their TTO Admin user to register their certificate

2. Complete the **Contact Information**.
3. Click the **Add Roles** button to add the roles to the account.
   a. Note the role description on the screen when adding a role.
   b. See Add System Roles for more information.
4. Select the **Agreement** check box below the *Roles* section.

The **Agreement** check box is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** check box is not checked and the **Save** button is clicked, the system displays the following error message: *User must accept the agreement by checking the field*.

5. Click the **Create** button to create the account or click **Clear** to clear all fields.

When you click **Create**, the system validates the account information. If there are no errors, then the *Account Details*screen opens, displaying a success message, .




**Other Actions:**

- Click the **Validate Certificate** button to validate the certificate. See Validate Certificate for more information.
- Click the **Manage** button if you want to make additional changes. See Manage System Accounts for more information.
- Click the **Back to Search** button to return to the *Search Account* screen.

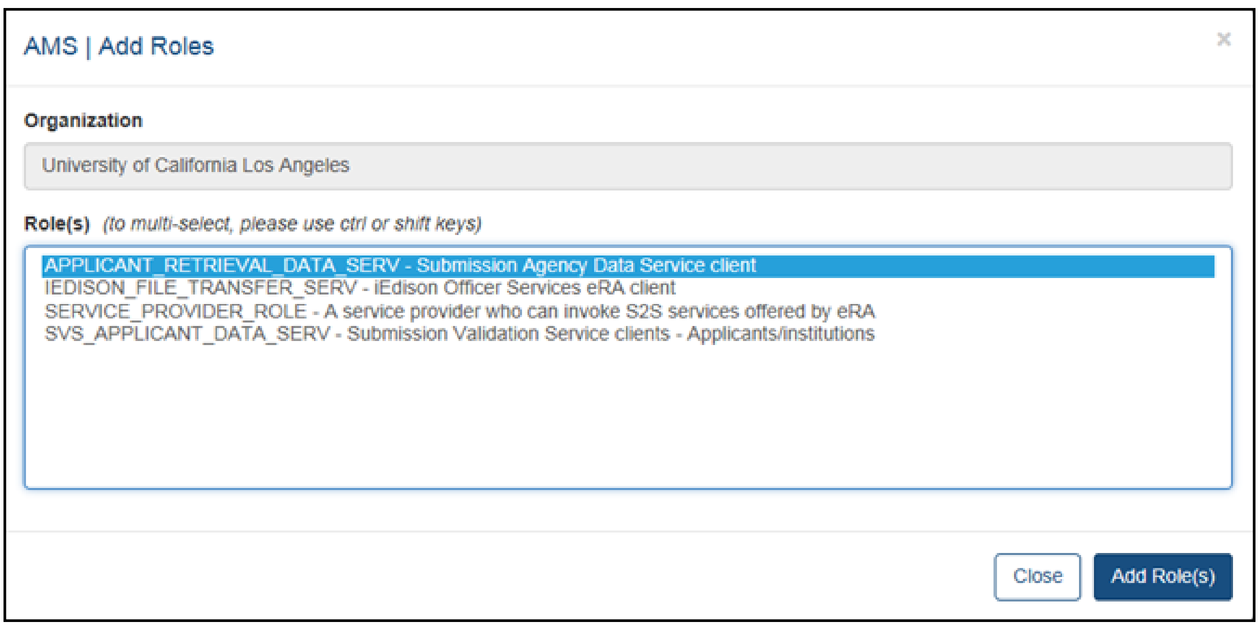
### 5.4.1 Add System Roles

**NOTE:** The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* screen.

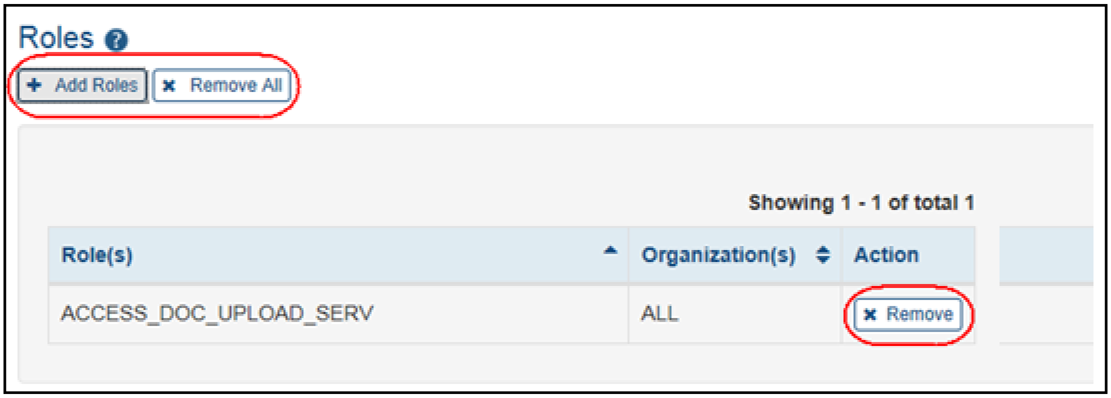

When the **+ Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

**External System Roles**




1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

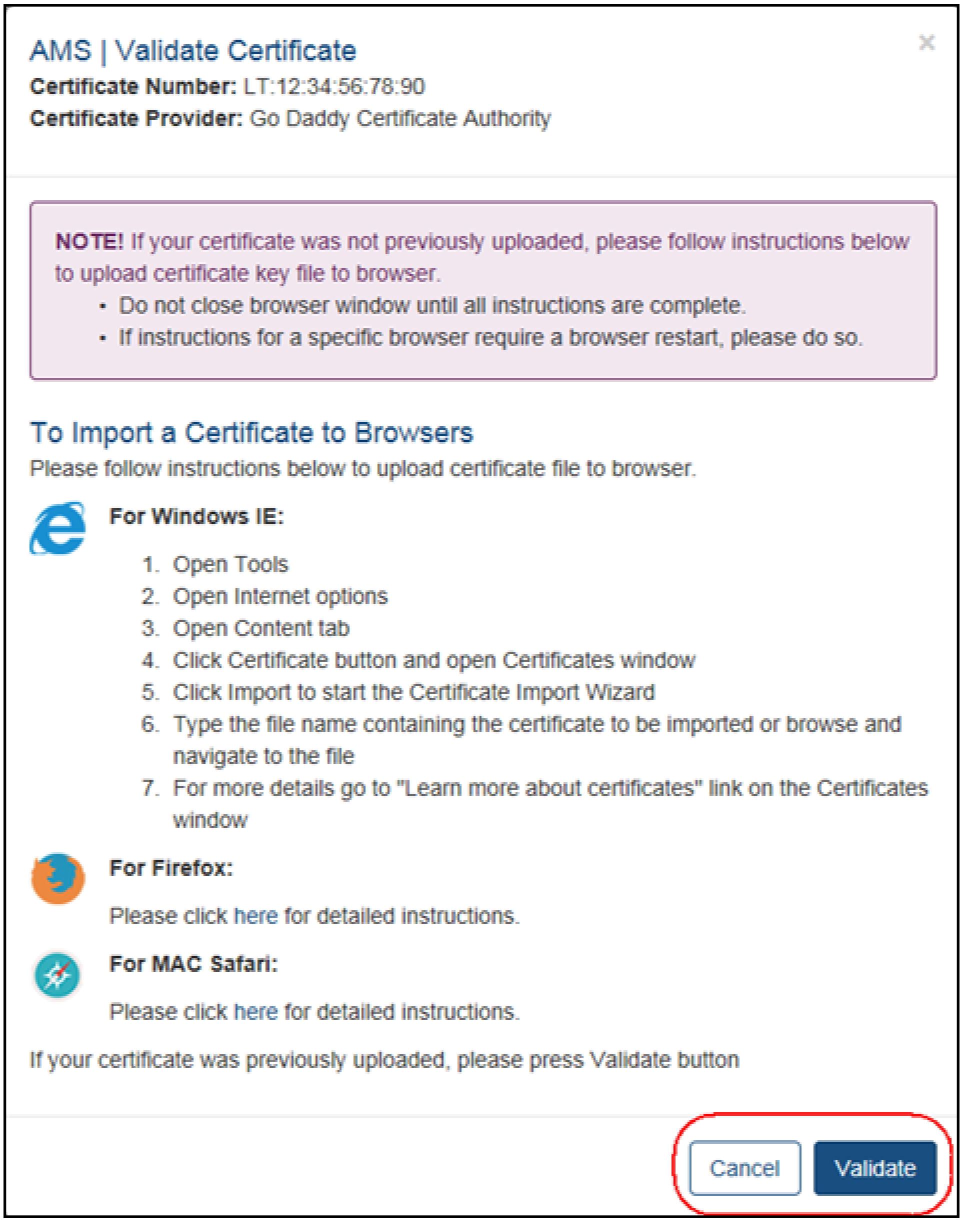



3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

### 5.4.2 Validate Certificate

When the **Validate Certificate** button is clicked on either the *Manage Account* or *Account Details* confirmation screen, the system displays the *AMS | Validate Certificate* screen with hyperlinks to instructions for the different browsers (i.e. Internet Explorer, Firefox, and Safari, etc.) for uploading a certificate file.

1. Perform one of the following options:
    a. To validate the certificate, click the **Validate** button on the *Validate Certificate* screen.
    b. Click the **Cancel** button to cancel the certificate validation.

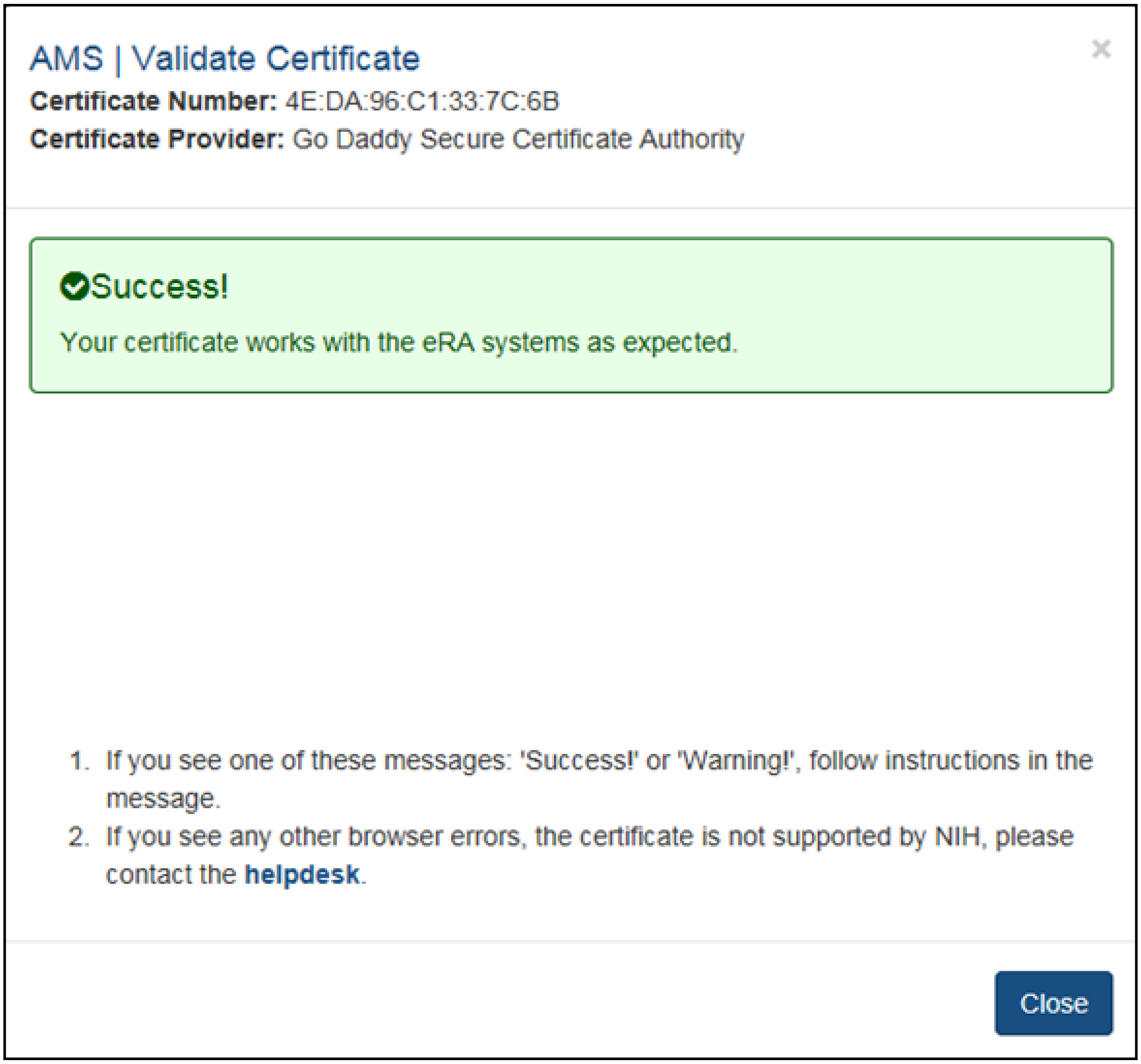



When the **Validate** button is clicked, the system performs the certificate validation.

If the browser call does go through to the certificate provider, but the details of the uploaded certificate do not match the details entered in AMS, then the following warning message opens:

> *Warning! - This certificate works with eRA systems correctly, but the certificate details you entered in the account do not match information in the certificate you are trying to validate. Certificate information in the account must match certificate you are trying to validate.*

If there are no validation errors, a second *Validate Certificate* screen displays the following success message: *Success! Your certification works with the eRA systems as expected*.




2. Click the **Close** button to close the screen.

The following audit information is audited and stored in the database:

- Certificate Number – Certificate Number of the uploaded certificate during validation
- Certificate Provider – Common Name of the uploaded certificate during validation
- Certificate Owner – The Certificate Owner that was entered during validation. The Certificate Owner is the organization who acquired the certificate.
- Time of Validation – Format: DD/MM/YYYY HH:MM:SS

- Result of Validation Attempt
  - Success
  - Validation is successful but the certificate details does not match the user entered details

# 6 Manage Accounts

## 6.1 User Accounts

Once an account is created it can be maintained via the *Manage Accounts* screen.

- Manage User Accounts

## 6.2 System Accounts

Agency, Commons, and iEdison external users can modify system accounts.

- Manage System Accounts

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:

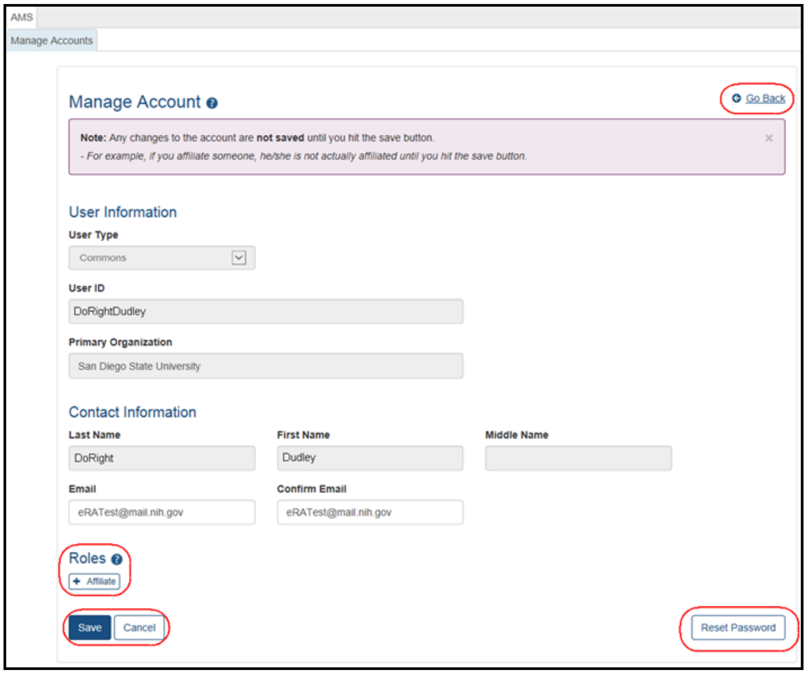
- Section 2.4.2 for iEdison users

## 6.3 Managing External User Accounts

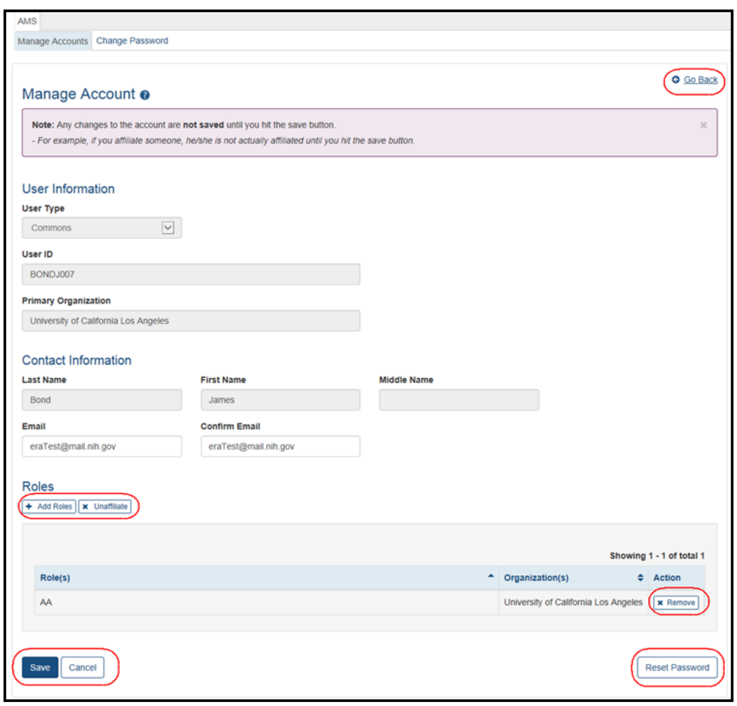
1. Perform one of the following steps to manage a user account:
    a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* screen.
    b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

When the **Manage** button is clicked via either option, the *Manage Accounts* screen opens.

Here is the Manage Account screen with an account not affiliated with an Organization or Institution.




Here is the Manage Account screen with a user account affiliated with an Organization or Institute.




An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts that need to be associated with multiple institutions. Users with the AA or SO role may create an affiliation for their organization only.

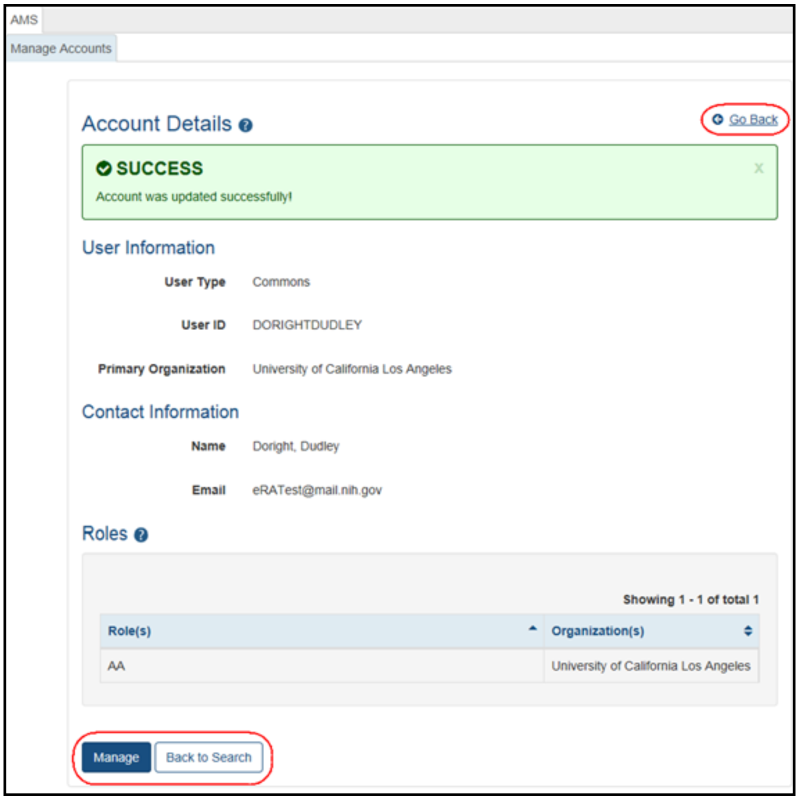
**NOTES:**

- Administrative and reporting roles such as SO, AA, AO, FSR, etc., cannot be combined with Scientific roles such as PI, TRAINEE, ASST, etc.
- Only accounts with scientific roles such as IAR, PI, TRAINEE, POSTDOC, etc., may have multiple affiliations. If an account has any roles in addition to these, additional affiliations cannot be added.
- Fields grayed out cannot be edited.

**Perform one or more of the following steps:**

1. Edit the **Email** addresses, if necessary.
2. To add or delete roles click the **+ Add Roles** button.
   a. For more information, see Add/Delete Roles.
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
   a. For more information, see Affiliate Account.
4. If the **Unaffiliate** button is present, you can click it to unaffiliate an account.
   a. For more information, please refer to the Unaffiliate Account.
5. If the account has been deactivated, a **Reactivate** button will be present at the bottom of the screen. Click it to reactivate the account. For more information, see Reactivate Account.
6. When you are done, click **Save** to save the changes or click **Cancel** to discard your changes.

When the **Save** button is clicked, the system displays the .




7. Perform one of the following options:
   a. To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
   b. To edit the account's information, click the **Manage** button.
   c. To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

### 6.3.1 Account Statuses

AMS user accounts can have the following statuses:

- Active — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days)
- *Pending Affiliation* — An individual account that has not been linked to an organization
- *Profile Only* — A user ID that is not associated to an account

### 6.3.2 Add/Delete User Roles

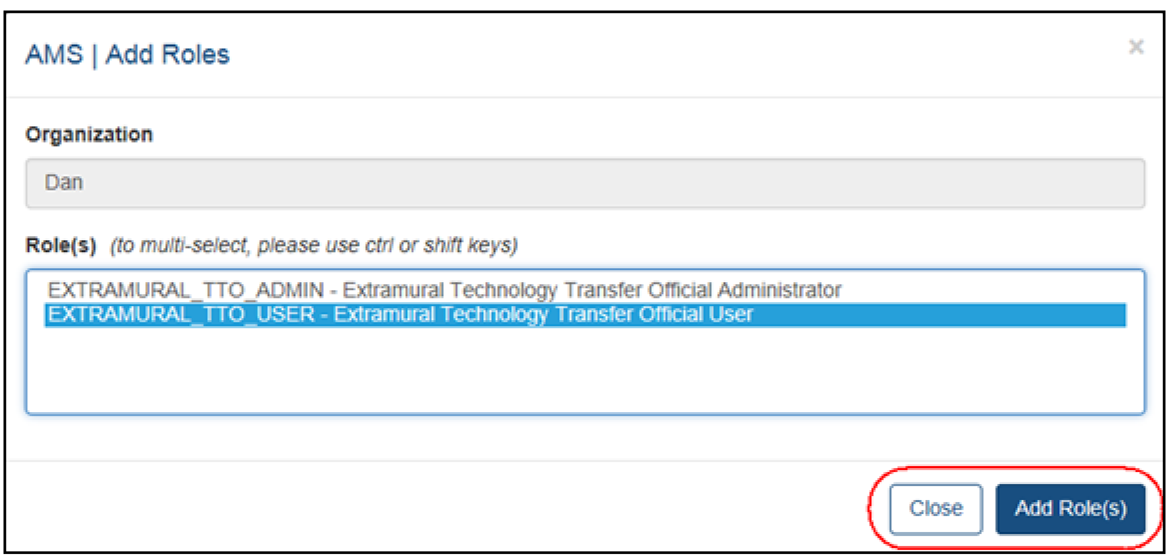
**NOTES:**

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.

---

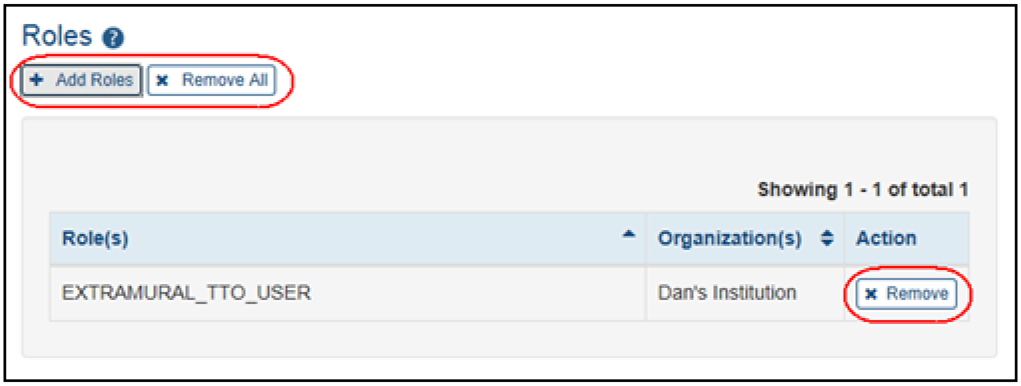
1. To add user roles to an account, click on the + **Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.


When the + **Add Roles** button is clicked on the *Create Account* or *Modify Account* screen, the pop-up *Add Roles* screen displays.



1. Select the appropriate role.
2. Click the **Add Roles(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



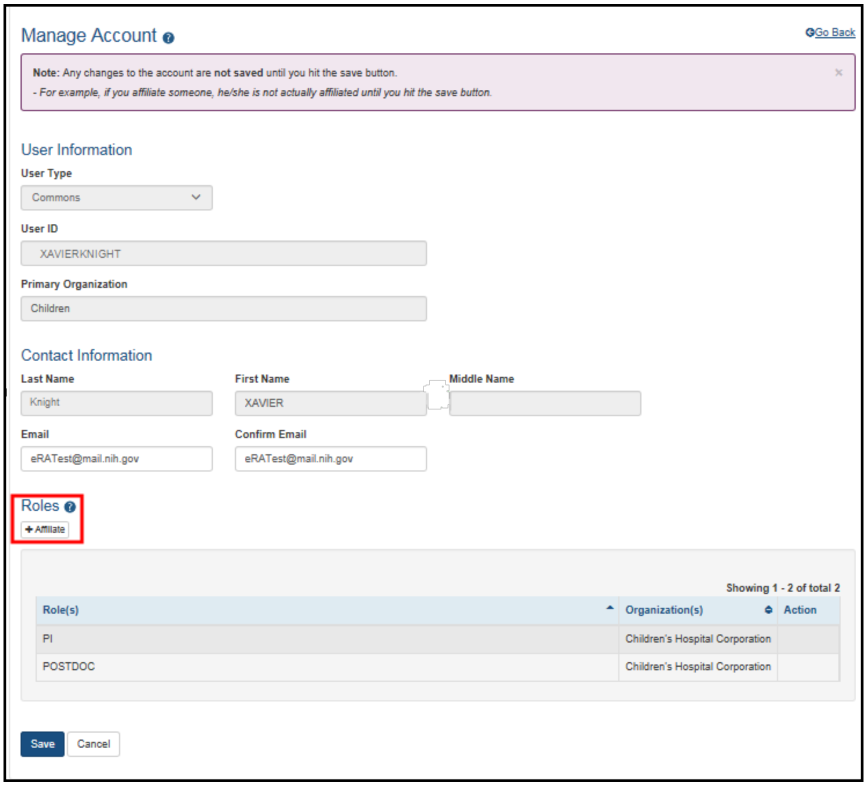

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

### 6.3.3 Affiliate Account

**NOTES:**

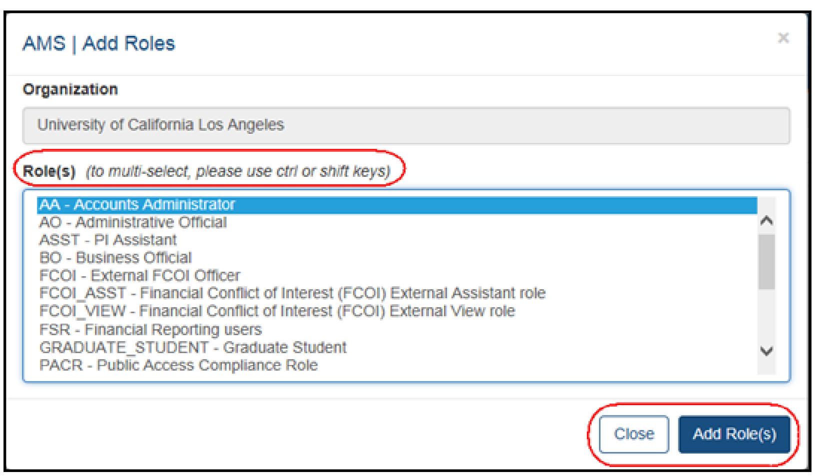
- Only accounts with ***scientific*** roles such as PI, SPONSOR, POSTDOC, ASST, etc., are permitted to be affiliated with more than one institution.
- Accounts with ***administrative*** roles can belong to one institution only.
- Further, if a user leaves (unaffiliates) an administrative role at one institution, that account cannot be affiliated to a different institution in any administrative **or** scientific role: The user needs to create a new account to use with the new institution.
- Additionally, you cannot remove administrative roles from an existing account in order to add a scientific role instead: Once a user has held administrative role, he or she must create a new user account to use in another role.

1. To affiliate an existing account with an organization, search for the user in AMS and select the **Manage** button in the action column of the search results.
2. Click the **Affiliate** button under *Roles* on the Manage Account screen, as shown here:



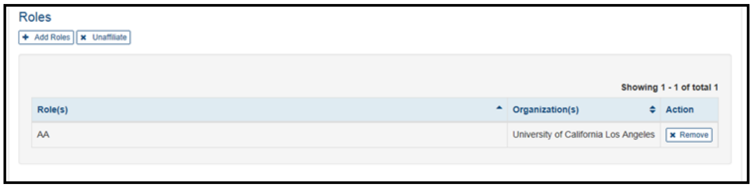

When the **Affiliate** button is clicked, the Add Roles screen opens, as shown here:

**NOTE:** The list of roles is dependent on the logged in user's role.




1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

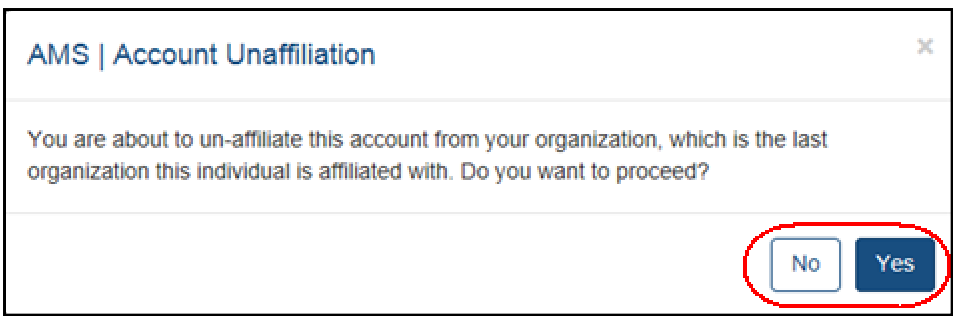
When the **Add Role(s)** button is clicked, the role is added, the account is placed in 'Active' status, and the **Unaffiliate** button appears in the *Roles* section, as shown here:




### 6.3.4 Unaffiliate Account

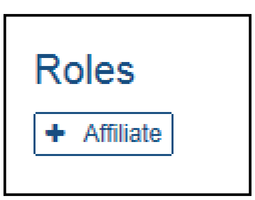
1. To unaffiliate an account, click the **Unaffiliate** button in the *Roles* section of the *Manage Account* screen.

When the **Unaffiliate** button is clicked, an *Account Unaffiliation* pop-up screen displays.




2. Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

When the **Yes** button is clicked, all roles assigned to the account are removed, the account is placed in 'Pending Affiliation' status, and the **Affiliate** button appears in the *Roles* section of the *Manage Account* screen, as shown here:




**IC Transfer Process**

1. The Account Coordinator will un-affiliate the account by removing all roles for their IC.
2. The account will go into ‘Pending Affiliation’ Status, in which there are no roles associated with the account, and the user cannot perform any functions.
3. An Account Coordinator from the new IC will search for accounts in ‘Pending Affiliation’ status and select an account to affiliate.

For information on Affiliating an account, see Affiliate Account.

## 6.4 Manage System Accounts

System accounts are used to access eRA Web Services.

Agency, Commons and external iEdison users can manage system accounts in their organizations.

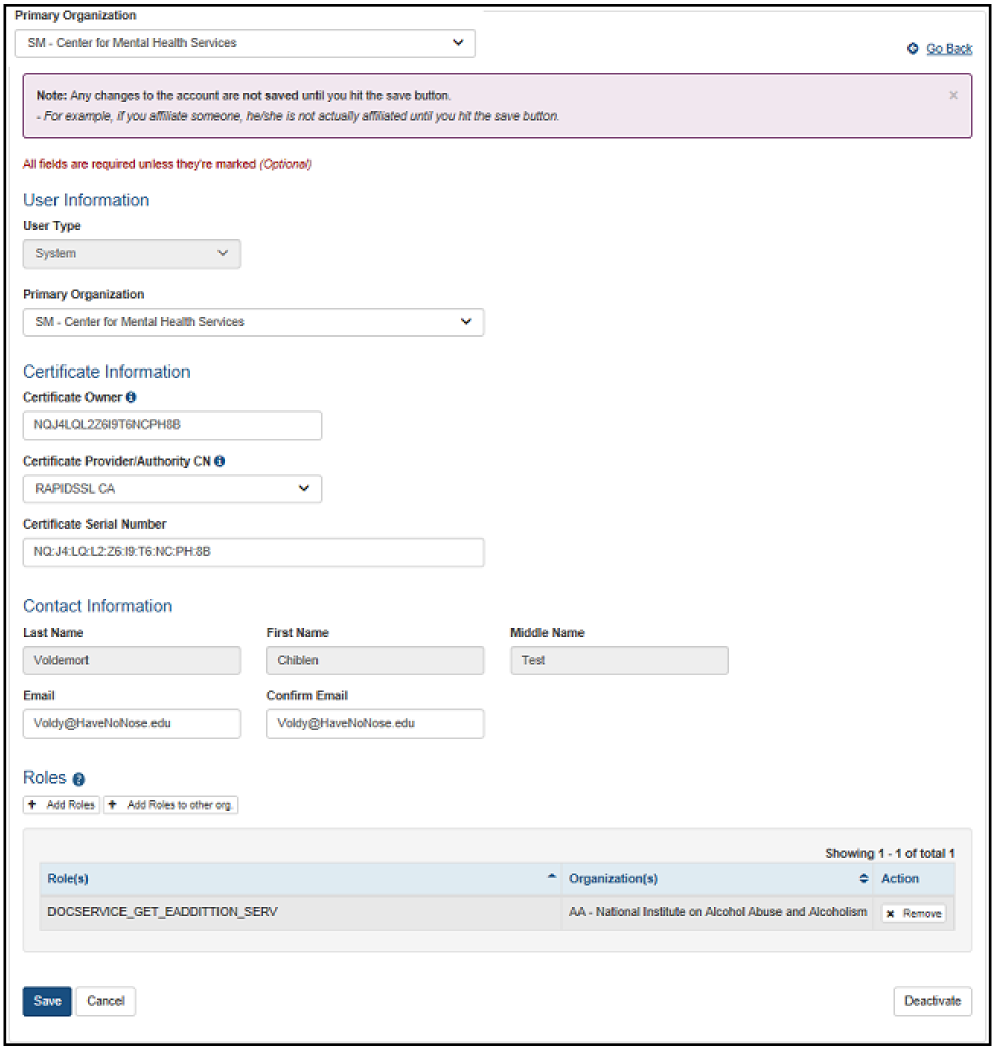
For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the Web Services Certificate (S2S) Guide:

- Section 2.4.2 for iEdison users

Perform the following steps:

1. To manage a system account, first perform a search to locate the account.
    a. See Search for System Accounts for more information.
2. On the Search Results screen, click the **Manage** button for the system account you want to manage.

When the **Manage** button is clicked, the *Manage Account* screen opens, as shown below.



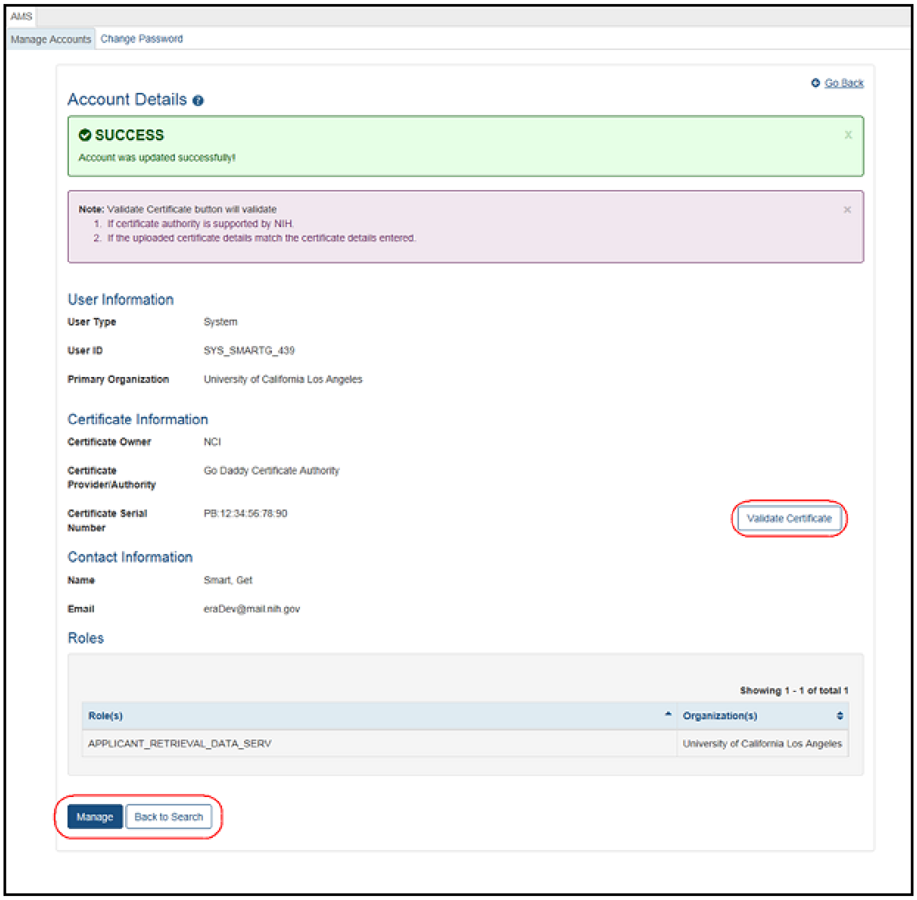

**NOTE:** Fields that are grayed out cannot be edited.

3. Edit the non-gray fields as needed.

4. Click the **Add Roles** button to add the roles to the account. See Add System Roles for more information.

5. To remove a role, click the **Remove** button. To remove all roles, click the **Remove All** button.
6. Click **Deactivate** to deactivate an account. See Deactivate Account for more information.
7. Click **Save** to save the changes or lick **Cancel** to cancel.

When you click **Save**, the *Account Details* screen opens and displays a success message, as shown below




8. You can perform these additional actions in the *Account Details* screen:
    - If the certificate needs to be validated, click the **Validate Certificate** button. See Validate Certificate for more information.
    - To return to the *Manage Accounts* screen, click the **Manage** button or the **Go Back** hyperlink.
    - To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

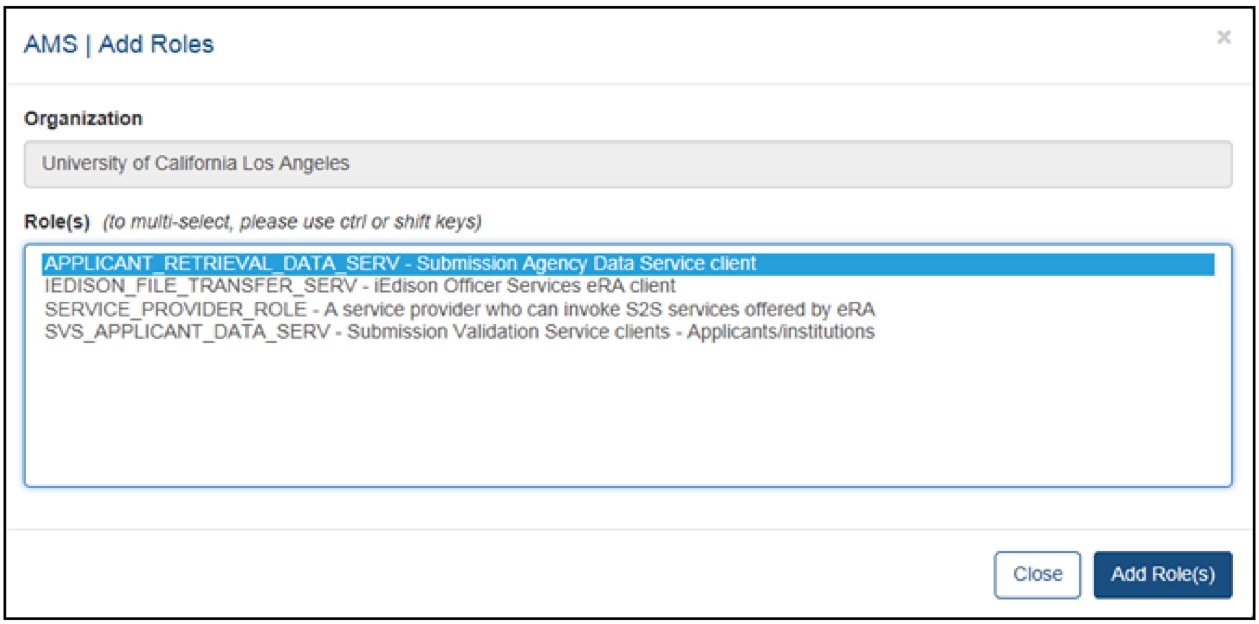
### 6.4.1 Add System Roles

**NOTE:** The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the **+ Add Roles** button on the *Create Accounts* screen.

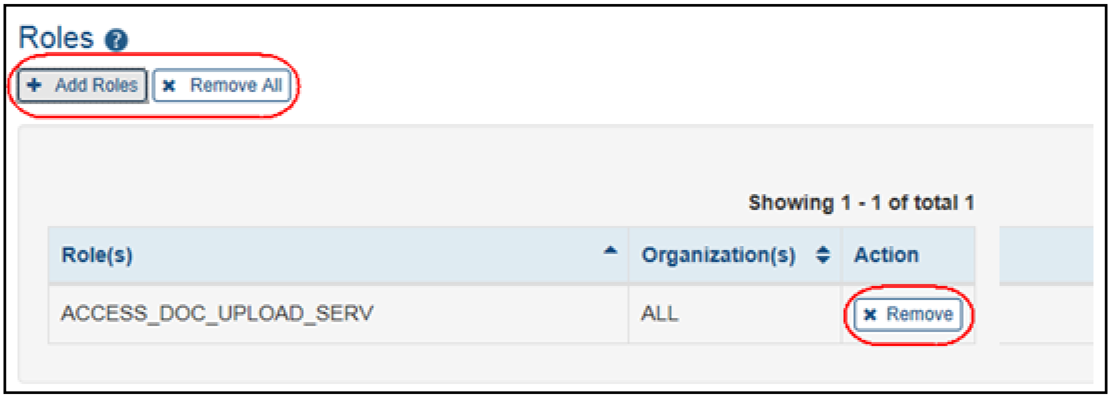

When the + **Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

**External System Roles**




1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



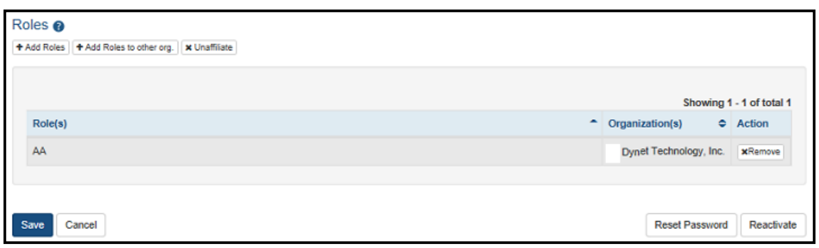

3. To add additional roles, click the **+ Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

## *6.5 Reactivate Account*

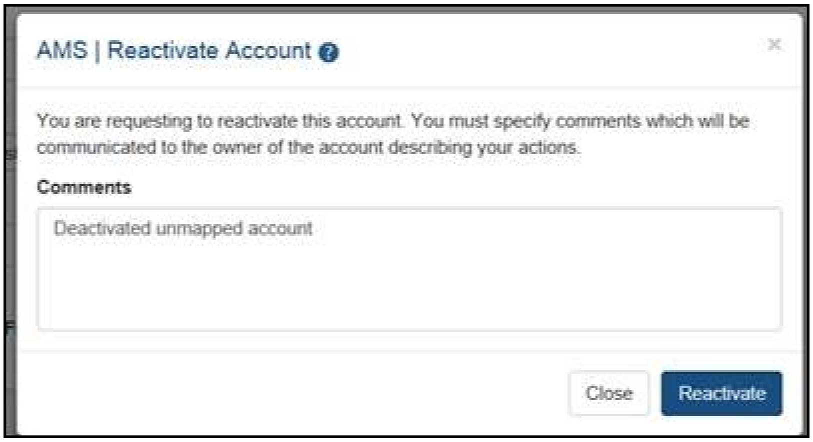
Follow these steps to reactivate an account that has been deactivated by an administrator.

1. Open the account in the *Manage Account* screen.

2. If an account is deactivated, a **Reactivate** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.




3. When you click **Reactivate**, the *Reactivate Account* screen opens, as shown here.




4. In screen, take these steps:

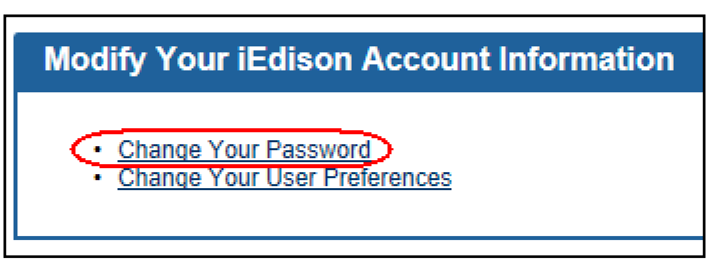
a. *Mandatory*: Enter comments in the comments field to inform the user about this action.
b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.

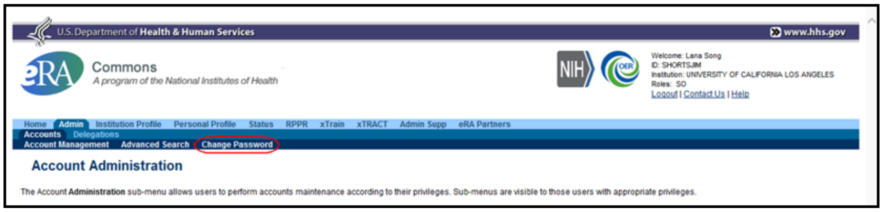
5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.
   And the account owner receives an email notification that includes the text you entered in the **Comments** field.

**NOTE:** The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

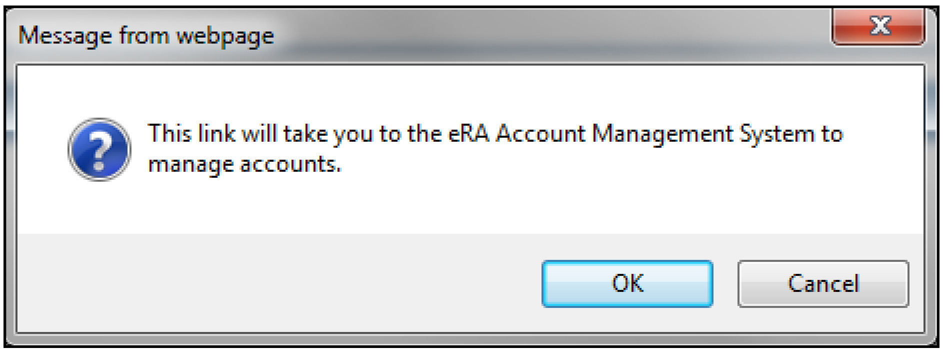
## 6.6 Change Password

1. Perform one of the following options:
   a. For external iEdison users, click the **Change Your Password** hyperlink on the *Main Menu* screen.
   b. For Commons users, click the **Change Password** tab.

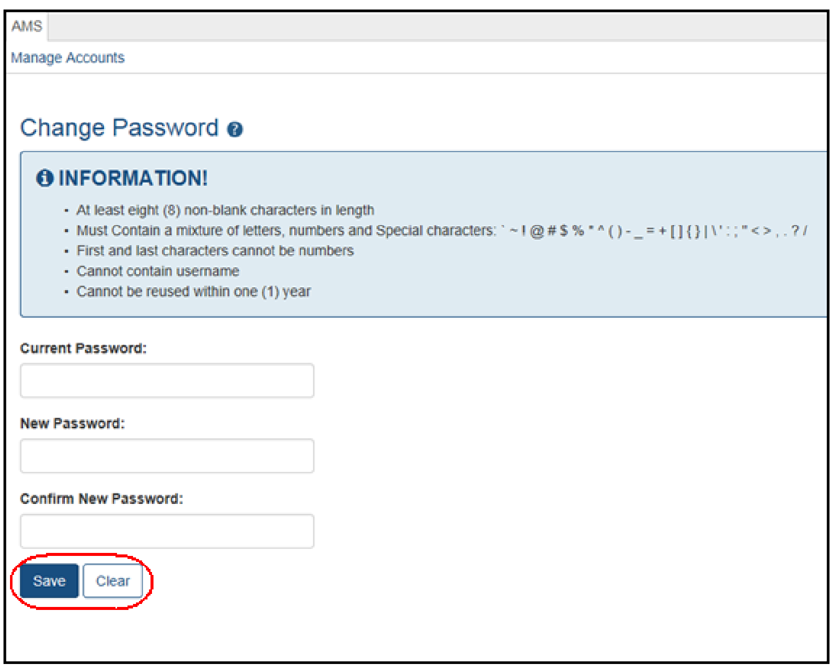





For iEdison users, when the **Change Your Password** hyperlink is clicked, a pop-up screen displays.




When the **OK** button is clicked on the pop-up screen or the **Change Password** tab is clicked, the *Change Password* screen displays in a separate browser window.



2. Enter your **Current Password**.
3. Enter a **New Password**.
4. Type your new password a second time in the **Confirm New Password** field.
5. Perform one of the following options:
    a. Click the **Save** button to save the changes.
    b. Click the **Clear** button to clear the fields.

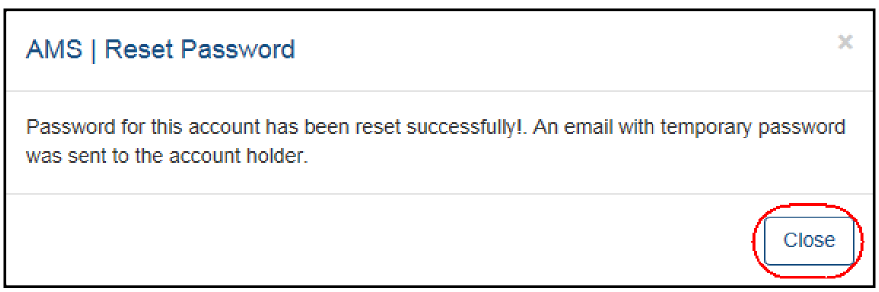
Use your new password the next time that you log into Commons or iEdison.

## 6.7 Reset Password

**NOTE:** Users are required to reset their passwords after a defined time period. The system locks the account is if the user fails to reset the password. Use this procedure to unlock these accounts.

1. To reset a user's account password, open account in the the *Manage Accounts* screen and click the **Reset Password** button  located on the lower right side of the screen.

2. A pop-up confirmation screen opens. Click **Close** to close it.




3. When you complete the password reset, an email notification with a temporary password is sent to the account holder.

# 7 User Reports

AMS includes the following reports capabilities:

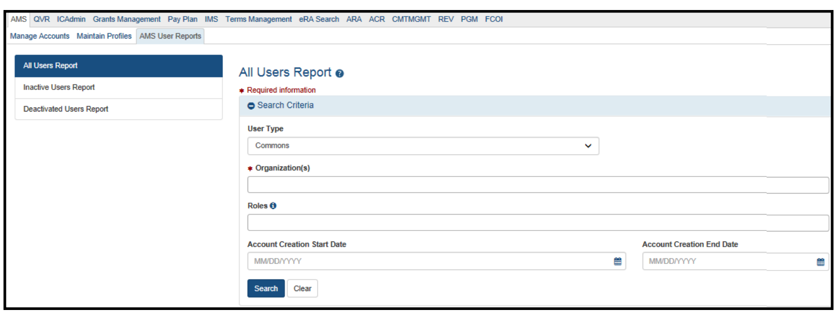
- **All Users Report** — Information on all user accounts in your organization
- **Inactive Users Report** — lists user accounts that have been locked due to inactivity (**note**: for internal users only)
- **Deactivated Users Report** — lists user accounts that have been deactivated by an administrator (**note**: for internal users only)
- **Role Description Report** — lists all roles, role descriptions, and associated privileges for any business area (**note**: for internal users only)

To open the reporting functions, click the **AMS User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

## 7.1 All Users Report Screen for External Users

*All Users Report* screen for Commons, external iEdison, and State Department users

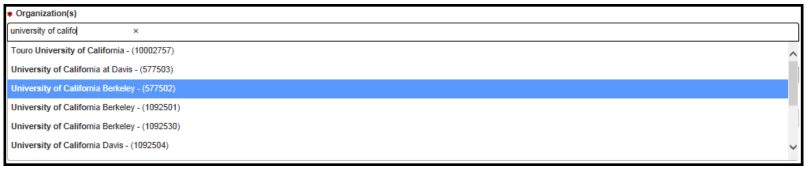



Use this screen to run an All Users Report on external users.

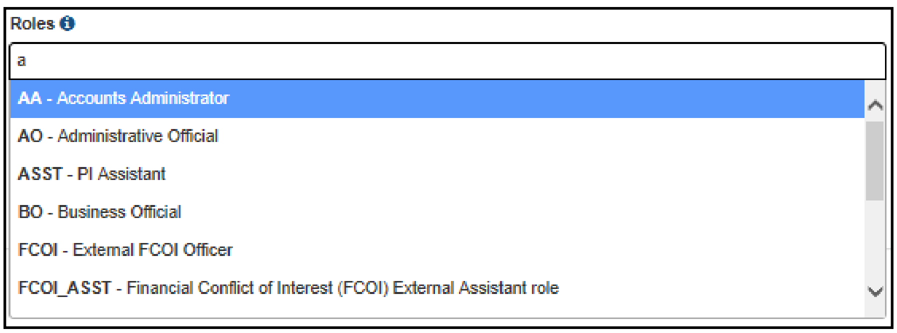
The **All Users Report** button is selected by default, as shown below. Follow the steps below to launch the report.


1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:

2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown below. (**note**: To select multiple organizations, hold the <Ctrl> key as you click.) **Note:** This field is mandatory.




3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note**: To select multiple roles, hold the <Ctrl> key as you click.)



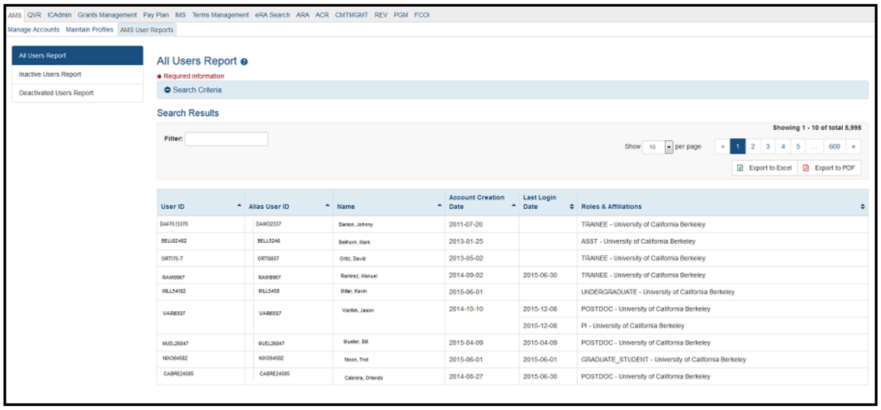

4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See [Report Output](#) below.

## 7.2 Role Description Report

# 7 Report Output

## 7.3 *All Users Report output*

To run the All Users report, click the **All Users report** button and enter search criteria as described above. When you click the **Search** button for the All Users report, the report output displays.

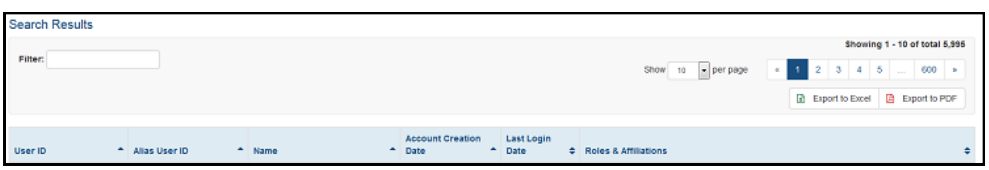



## 7.4 *Role Description Report output*

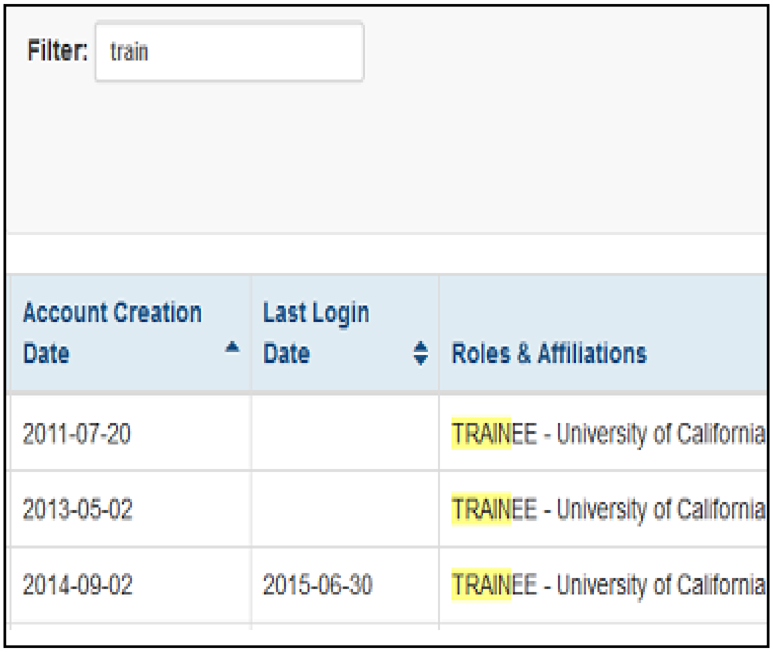
## 7.5 *Navigating the report output*

These tips for browsing, filtering and exporting the report output apply to all report types.

The report output displays include the controls shown here.



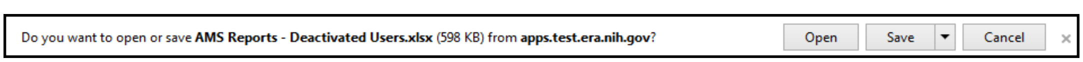

- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term will be displayed, and all instances of the filter text will be highlighted in yellow, as shown below:




- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button, shown here:


- ◦ **Export to Excel**

When you click this button, an open-or-save dialog opens, as shown here.




Click **Open** to open the report data in Excel. A new Excel window opens Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

- ◦ **Export to PDF**

Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.